HelpDesk OSP – User Manual

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1 Introduction

With *HelpDesk OSP* support cases – or other issues that need to be tracked – are formalized in tickets, which are filled out automatically or by the people working at the helpdesk. As the tickets are gathered at a SharePoint or Office Live site it is easy to organize and co-operate on them.

We hope that you will get a good understanding of *HelpDesk OSP* by studying this manual and the online video demonstrations. You are welcome to print the manual or parts of it and use it within your organization. You may also change or add text or images so that the manual better suits your needs. To make this easy we have opted to create it in DOC format, as well as in PDF.

When we talk about **clients** in this manual we mean the people who are handling the tickets, for example members of a support team, or the machines used by them.

HelpDesk OSP is a helpdesk application built on Outlook and SharePoint or Office Live. Basically, what *HelpDesk OSP* does is connecting Outlook to SharePoint/Office Live and adding functionality to all components. The most common scenario is that you use *HelpDesk OSP* with either SharePoint or Office Live, but if you so wish, you can use *HelpDesk OSP* with both.

The *HelpDesk OSP* application combines three parts:

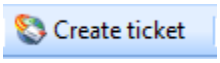
- Outlook add-in installed on every helpdesk worker's client machine. The add-in can also be installed in Outlook on a server, for example for use with Outlook Web Access.
- SharePoint or Office Live list
- Statistics tool with report generator

The **Outlook add-in** has

- A button which allows you to create support tickets from the selected e-mail. This conversion can also be done automatically. The e-mails are converted into tickets complete with attachments, rich text, priority and sender information.

  Outlook 2010 ribbon:

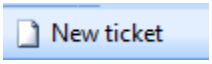
  Earlier Outlook versions:

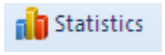
- A button for creating a new ticket, for example if you receive a telephone call.

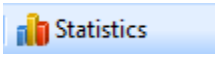
  Outlook 2010 ribbon:

  Earlier Outlook versions:

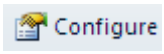
  

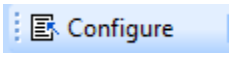
- A link to the **Report generator**, our application *OLAP Reporting Tool* for Excel.

  Outlook 2010 ribbon: 

  Earlier Outlook versions: 

- A **Settings form** that handles the connection between Outlook and SharePoint/Office Live.

  Outlook 2010 ribbon: 

  Earlier Outlook versions: 

The Outlook add-in can also have other buttons; refer to *HelpDesk OSP* buttons in Outlook.

If you have **several Outlook profiles**, *HelpDesk OSP* will work on all of them.

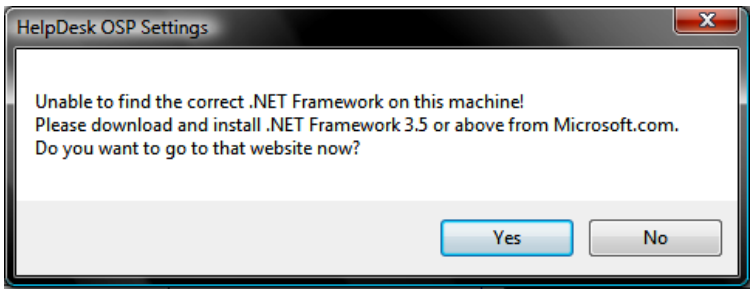
HelpDesk OSP works with **SharePoint lists**, and those lists can be hosted on many brands of SharePoint including both version 2 and 3, as well as both the SharePoint services versions and the SharePoint Portal Server and MOSS versions. **Office Live** is technically another brand of SharePoint.

To simplify this documentation we are only talking about SharePoint lists, but unless specifically stated everything said here also applies to lists on Office Live.

2 Requirements

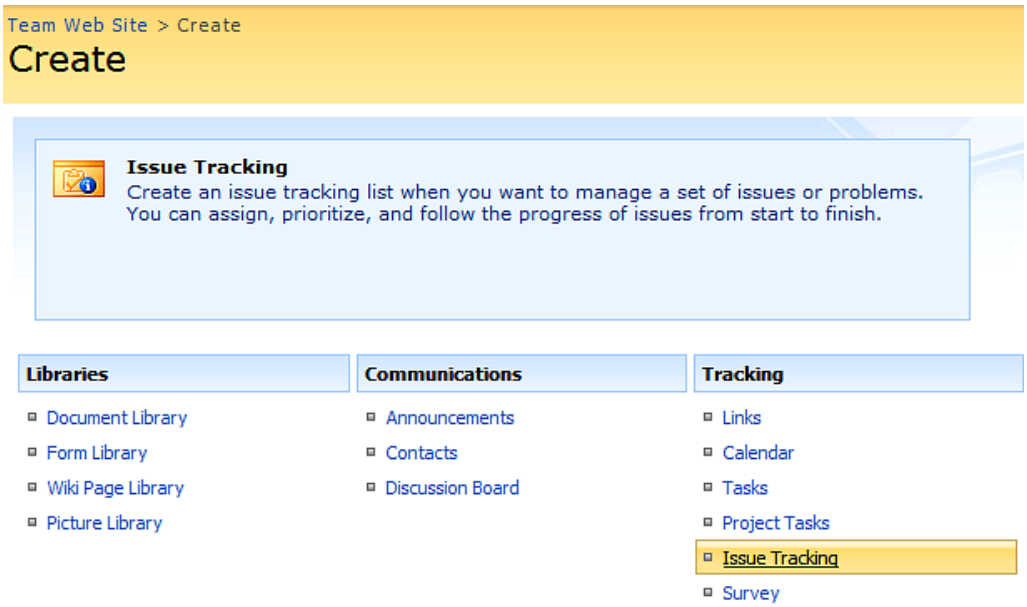
To install and use *HelpDesk OSP* you need **Microsoft Outlook 2000 or above** installed on each client. You also need a functioning **SharePoint site, version 2 or above**, or a functioning **Office Live Small Business site**. *HelpDesk OSP* helps you get more out of those programs, but it does not assist you with the general configuring of them.

Each client also needs to have **.NET Framework 3.5**. If you don't have it installed you can download it from Microsoft. If a client without .NET Framework 3.5 tries to open the Configure dialogue he gets a message asking him to download this application.

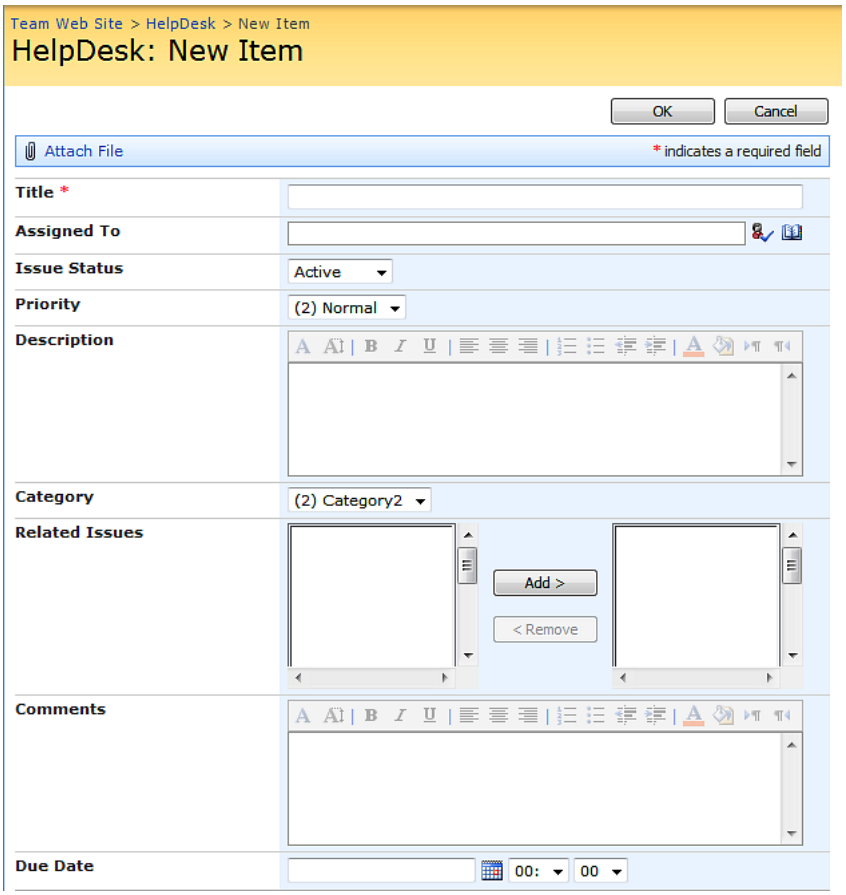

HelpDesk OSP Settings
Unable to find the correct .NET Framework on this machine!
Please download and install .NET Framework 3.5 or above from Microsoft.com.
Do you want to go to that website now?
Yes
No

3 The SharePoint site

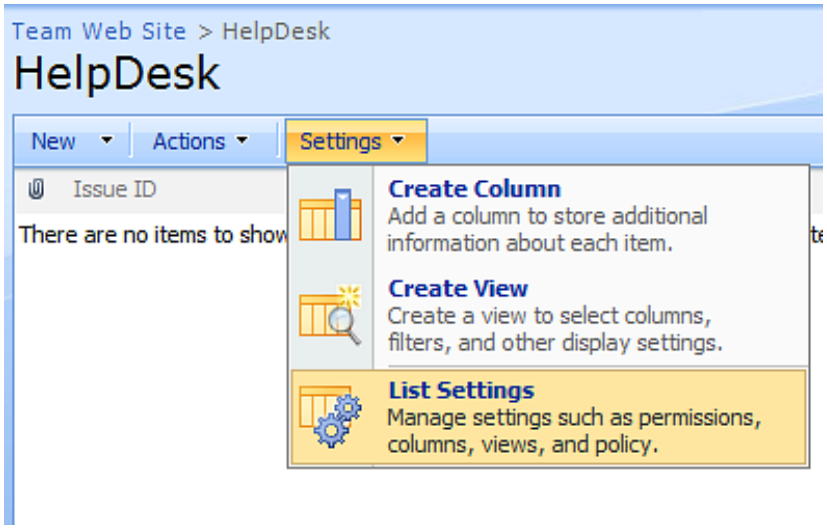
If you want to use *HelpDesk OSP* with SharePoint, you must have a SharePoint site set up and functioning. Often the Tasks list or even better the Issue tracking list is suited for helpdesk tickets, but you can use any of the templates provided by Microsoft and customize it after your needs. Here we call the list "HelpDesk".



By default the new items – the tickets – in the Issue tracking list looks like this:



The design of the ticket is very easy to customize, like with all lists in SharePoint.

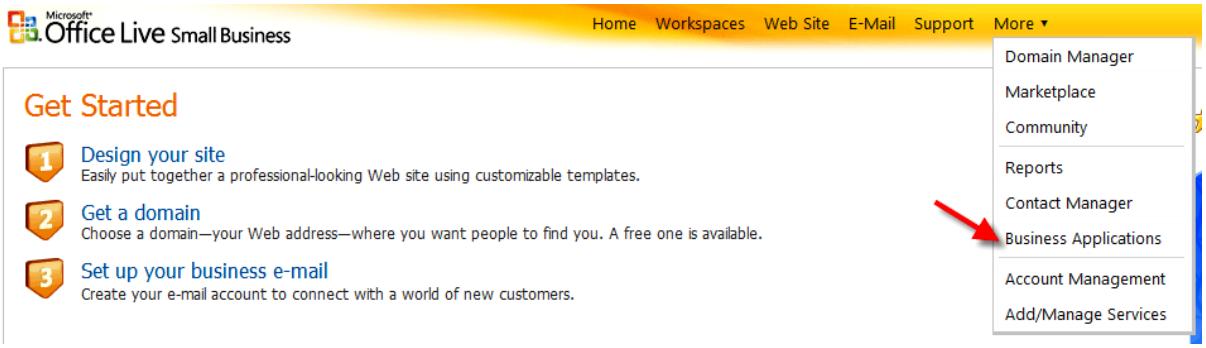

Team Web Site > HelpDesk
HelpDesk
New
Actions
Settings
Issue ID
There are no items to show
Create Column
Add a column to store additional information about each item.
Create View
Create a view to select columns, filters, and other display settings.
List Settings
Manage settings such as permissions, columns, views, and policy.

However, **without** *HelpDesk OSP*, there is no connection to Outlook, no e-mail conversion feature, no information about who is calling or having the problem and no address book integration.

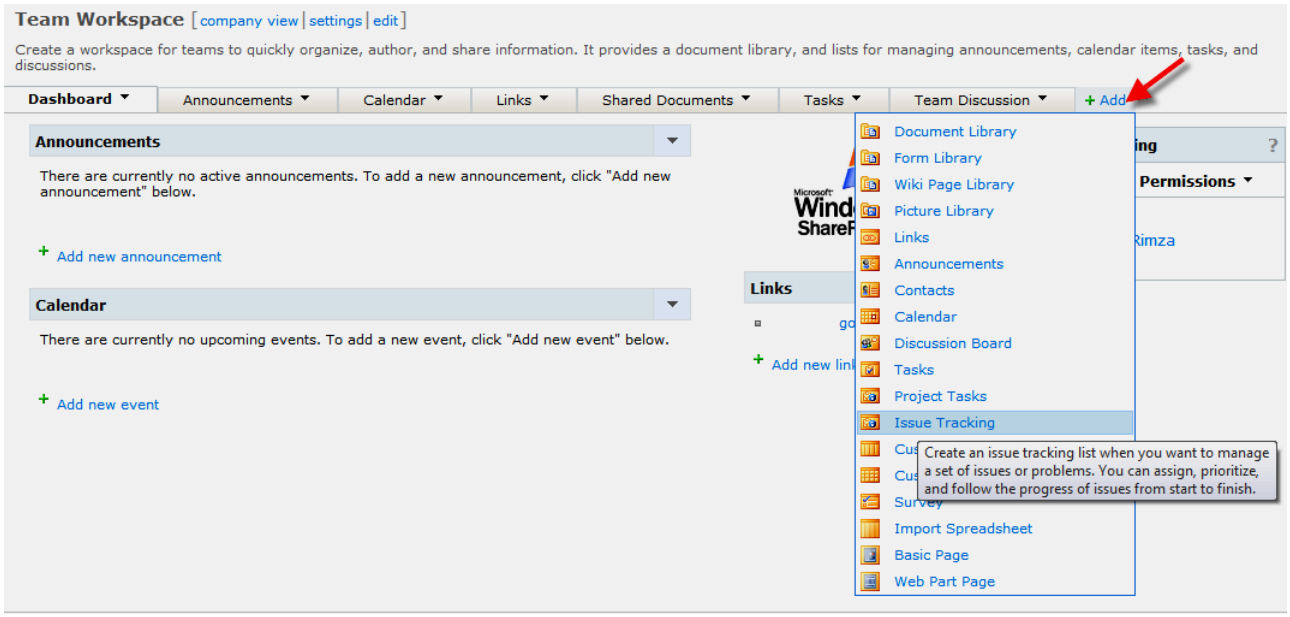
4 The Office Live Site

When you start using *HelpDesk OSP* with Office Live you must have an Office Live Small Business site set up and functioning. Each client also needs to have a Windows Live ID.

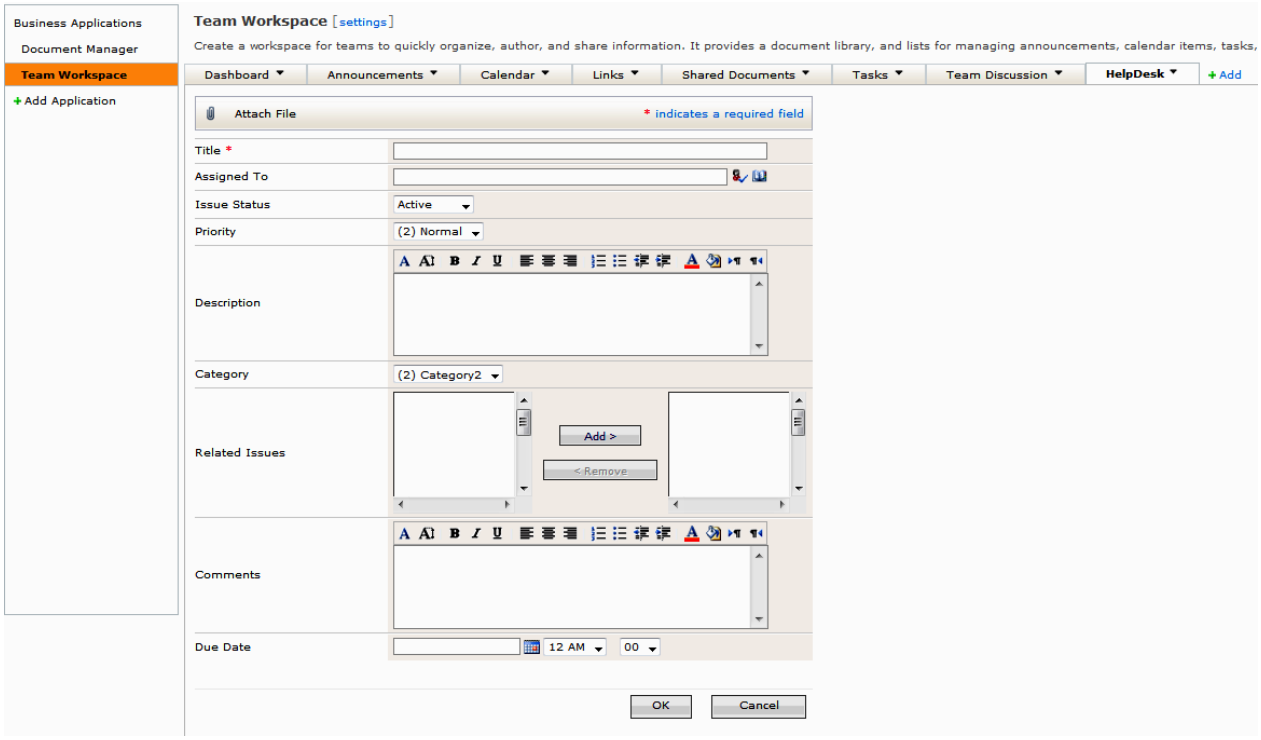
You can manage your lists from "Business Applications" option from the "More" dropdown in menu.



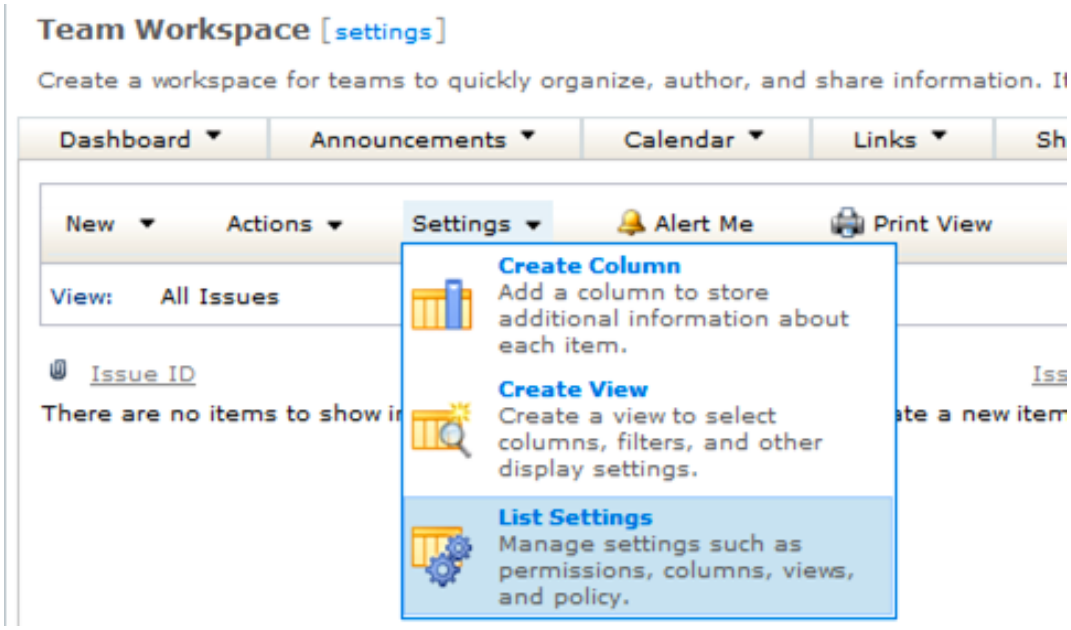
It is possible to use the Tasks list for *HelpDesk OSP,* but often an Issue Tracking list is a bit more suited for helpdesk tickets. Here we call this list "HelpDesk".


Team Workspace [company view | settings | edit]
Create a workspace for teams to quickly organize, author, and share information. It provides a document library, and lists for managing announcements, calendar items, tasks, and discussions.
Dashboard
Announcements
Calendar
Links
Shared Documents
Tasks
Team Discussion
+ Add
Announcements
There are currently no active announcements. To add a new announcement, click "Add new announcement" below.
+ Add new announcement
Calendar
There are currently no upcoming events. To add a new event, click "Add new event" below.
+ Add new event
Links
Permissions
Document Library
Form Library
Wiki Page Library
Picture Library
Links
Announcements
Contacts
Calendar
Discussion Board
Tasks
Project Tasks
Issue Tracking
Import Spreadsheet
Basic Page
Web Part Page
Create an issue tracking list when you want to manage a set of issues or problems. You can assign, prioritize, and follow the progress of issues from start to finish.

By default the new items - the tickets - in the HelpDesk (or Issue tracking) list looks like this:



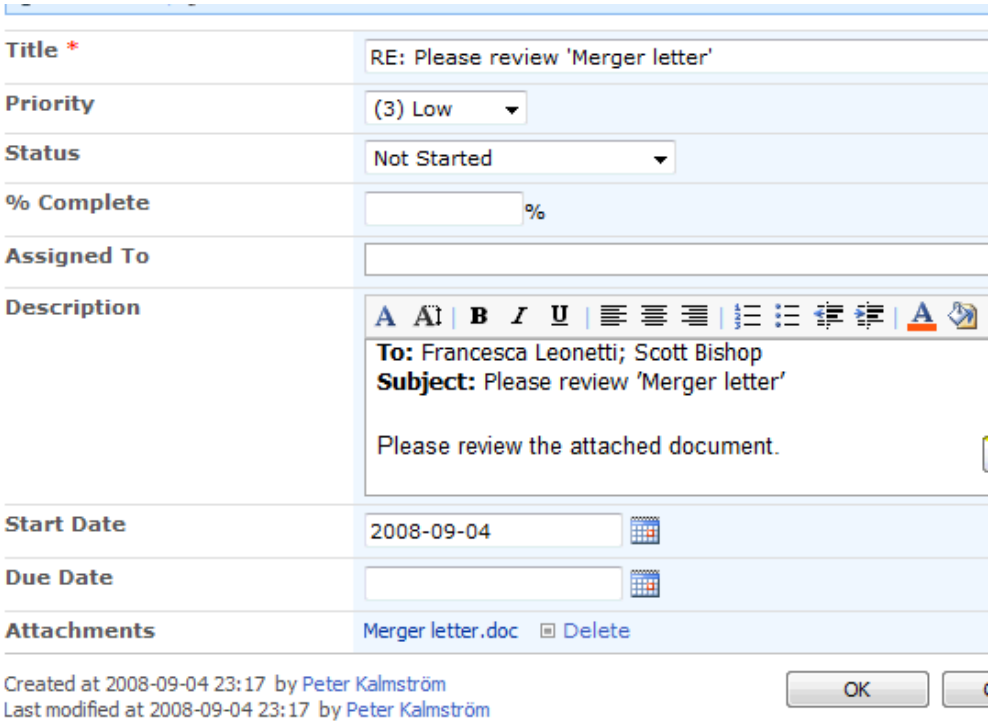
The design of the ticket is very easy to customize, like with all lists in Office Live.



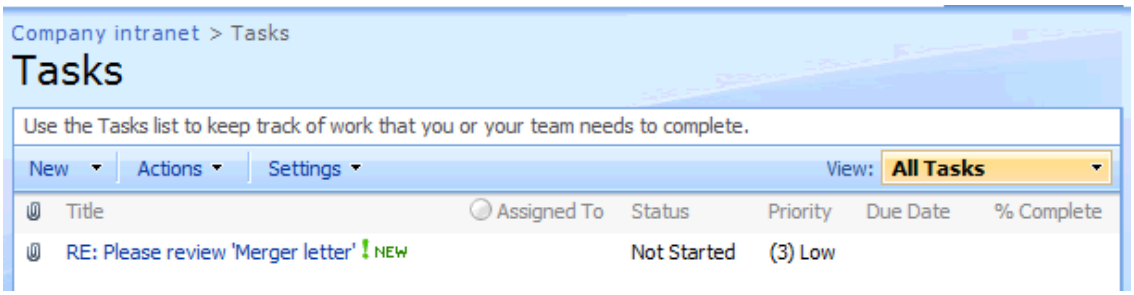
However, **without** *HelpDesk OSP*, there is no connection to Outlook, no e-mail conversion feature, no information about who is calling or having the problem and no address book integration.

5 The ticket

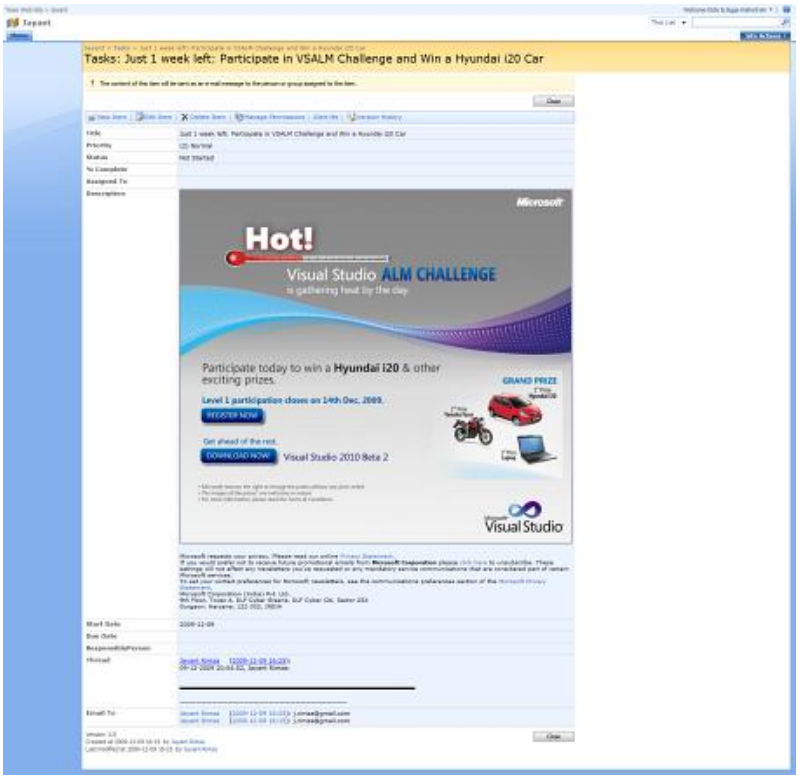
The Description field of the ticket gets the same formatting as the e-mail, and attached files are included.



The ticket is shown in the list as any other SharePoint/Office Live item and can be treated in the same way.



If the e-mail has embedded or inline images, they will appear at exactly the same place when the e-mail has been converted to a ticket. If the image has links they will work in the ticket also.

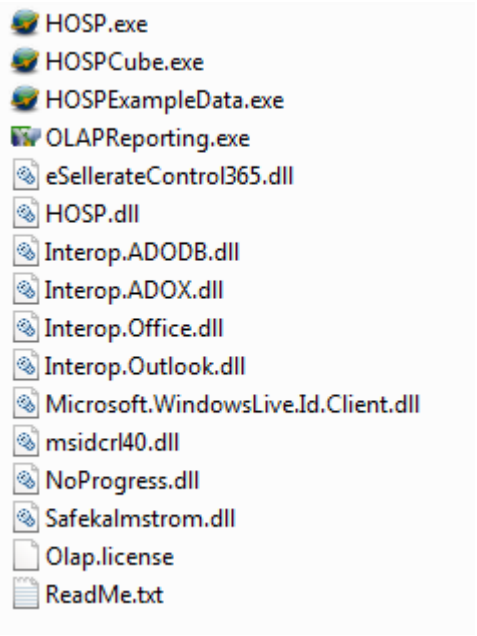

Tasks: Just 1 week left: Participate in VSALM Challenge and Win a Hyundai i20 Car
Hot!
Visual Studio ALM CHALLENGE
Participate today to win a Hyundai i20 & other exciting prizes.
Visual Studio 2010 Beta 2
Visual Studio

6 Installation of HelpDesk OSP

NOTE: Outlook should be closed when *HelpDesk OSP* is installed.

When you click the downloaded file (**HelpDeskOSPSetup.exe**) and are asked if you want to run it, please confirm that it comes from Tallstugans Forlag HB, the mother company of kalmstrom.com Business Solutions. If the file is not digitally signed you should not run it.

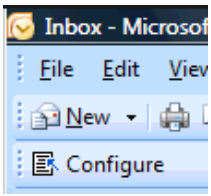
When you have clicked the **HelpDeskOSPSetup.exe** file and accepted the license agreements, the file handles the installation by itself. Most of the *HelpDesk OSP* files are installed under Program files, and there are no choices to make. When the installation is finished, you will have the following files in **Program files/kalmstrom.com/HelpDesk for Outlook and SharePoint**.



For a full description of the files and their purpose, refer to General Architecture.

When you open Outlook you can see a new toolbar there, with a Configure button.

(After you have clicked the Configure button and defined the settings, you will have more buttons, for Creating a ticket from e-mail, for creating a New ticket and for *OLAP Reporting Tool*. Refer also to *HelpDesk OSP* buttons in Outlook.)



Outlook 2010 ribbon:

7 Example Data – for new users

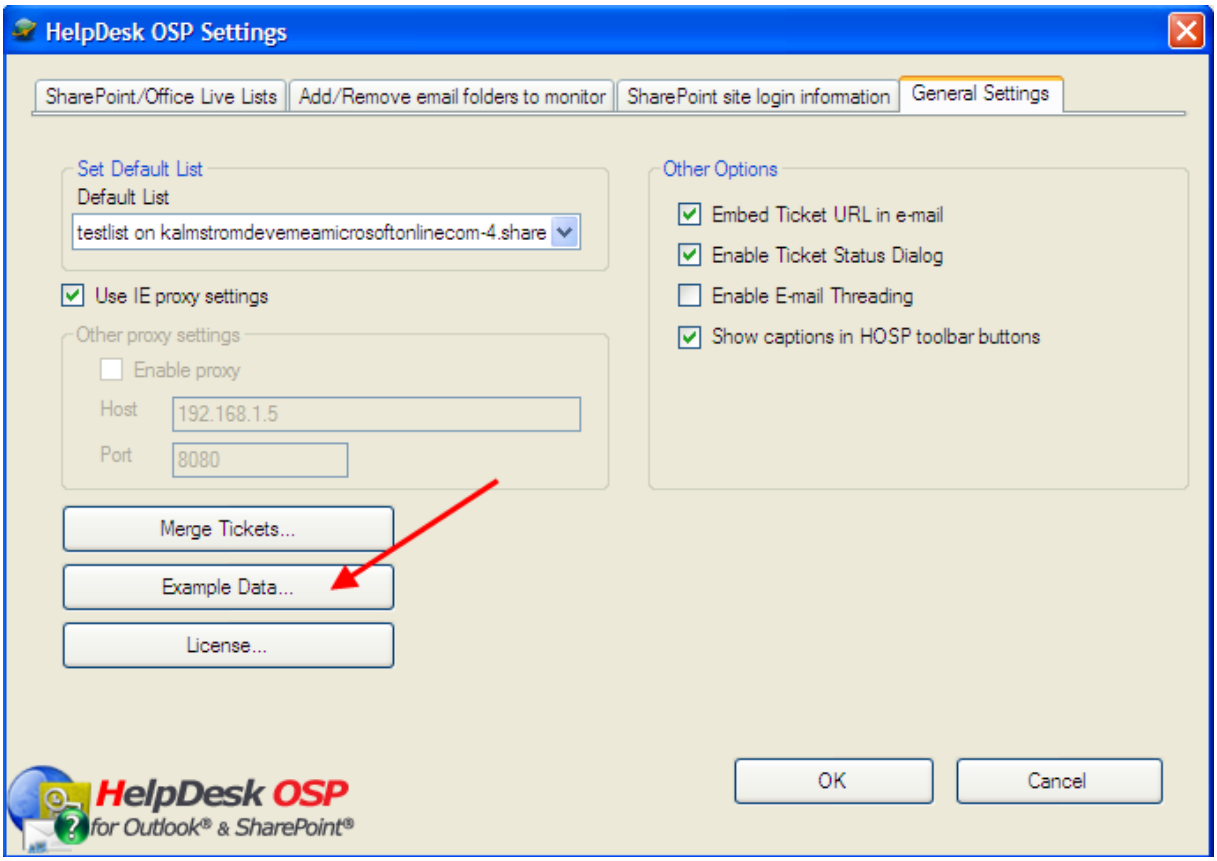
If *HelpDesk OSP* is new to you, it might be a good idea to load the Example Data. They will give you an opportunity to see how *HelpDesk OSP* works when you have much data in it, what performance you can expect and so on. You can edit the Example Data according to your needs, and from the Example Data you can create tickets in the selected SharePoint or Office Live list.

7.1 Launch the Example Data Application

The Example Data application is launched via the Configuration button in Outlook, the fourth tab in the dialog.

However, **before** you launch the Example Data you have to select a SharePoint or Office Live list, refer to Configuration of *HelpDesk OSP* - first tab, connection to SharePoint/Office Live.

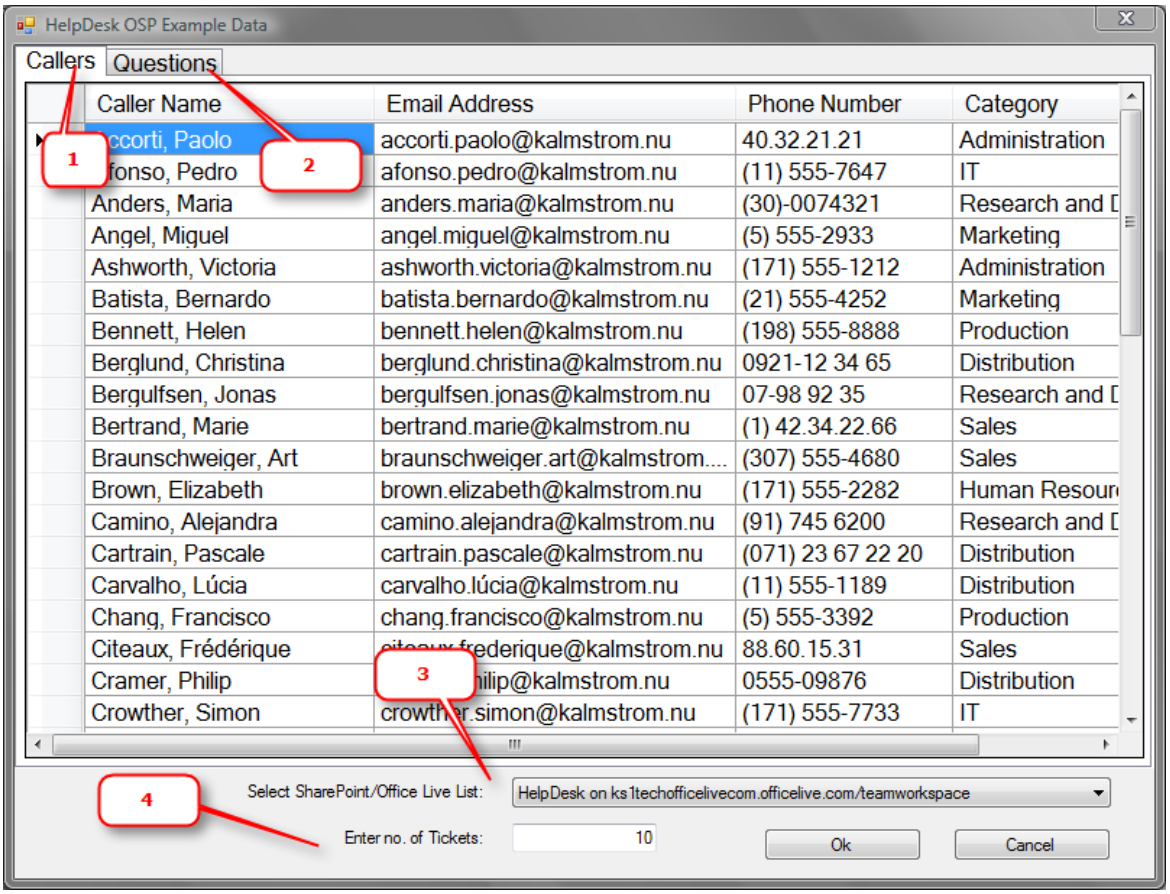
When you have entered the URL to the site, connected to it and selected a list, click on the Example Data button under the **General Settings** tab in the Configuration dialog to create Example Data.



7.1.1 Example Data Sections

The Example Data application contains four sections:

1. Callers: - Details about the callers, like Caller Name, E-mail Address, Telephone number and Category.
2. Questions: - Details regarding the queries, like Subject and question.
3. List: - From this dropdown you should select the SharePoint or Office Live List you have configured.
4. Number of tickets: - Enter how many tickets you want to create.



7.1.2 Editing Example Data

You can adapt the Example Data to your needs by editing or deleting them. You can also add new data in the grid.

- Edit: To edit an existing row, type the new data over the required row as you do in Excel.
- Delete: Select the rows from the row header and press the delete key to delete the selected row(s) from the Example Data.
- Add: To Add a new row, start filling all columns in last row of the grid. This way you can add new data.

7.1.3 Create Example Tickets

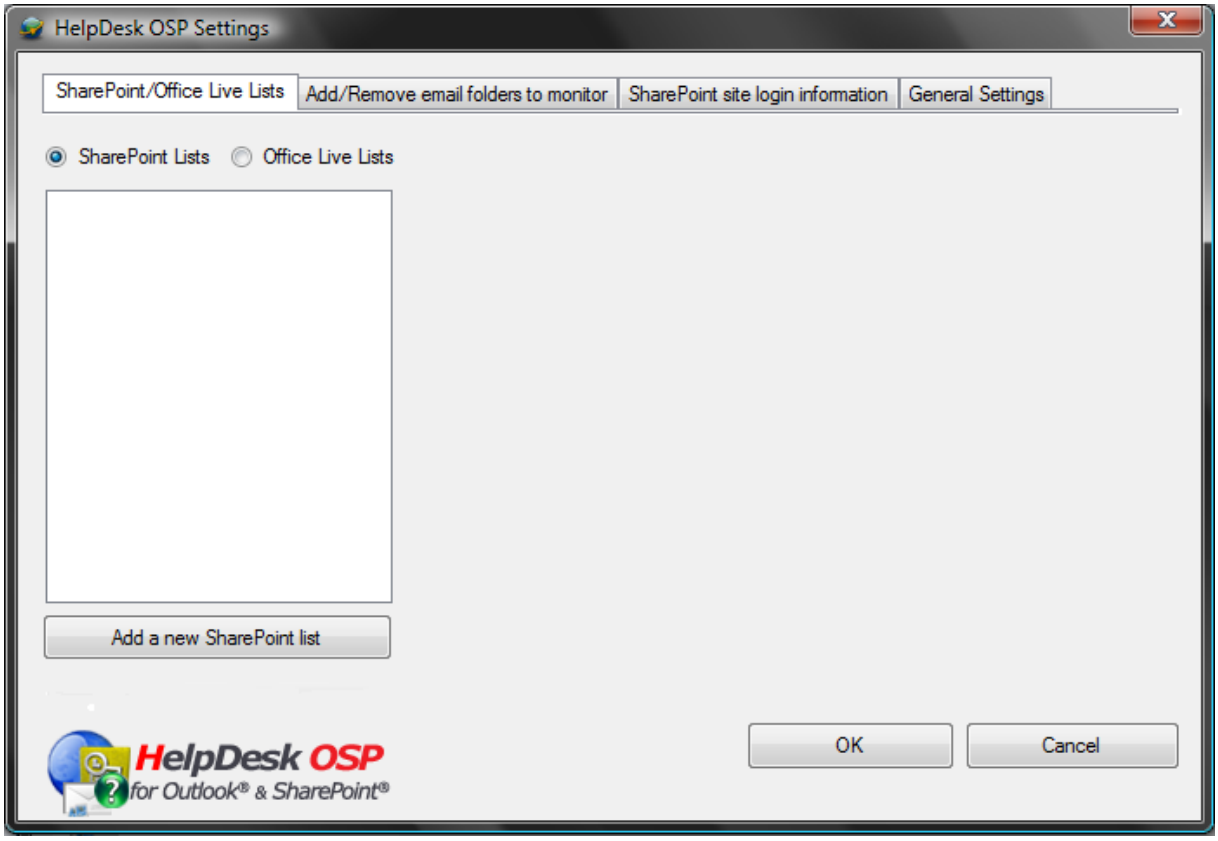
Click on the OK button, and the application starts to create Example tickets in the SharePoint list you have selected. The time needed for creation of tickets depends on how many tickets you have selected to create.

7.2 Remove Example Data

When you don't want to use the Example Data anymore, just delete the tickets you created from them in the SharePoint list.

8 Configuration of HelpDesk OSP - first tab, connection to SharePoint/Office Live

Press the Configure button in Outlook, and the Settings dialog is shown. The Settings dialog defines the connection between Outlook and SharePoint/Office Live.

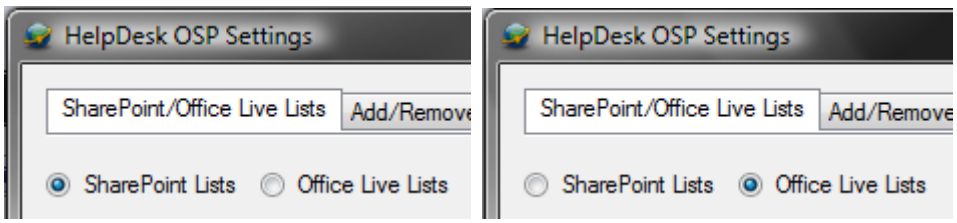


The list settings are stored on the SharePoint or Office Live site, and the user information is stored locally on each machine where *HelpDesk OSP* is installed. Refer also to General Architecture.

8.1 All users

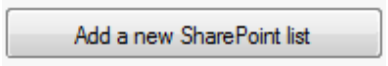
All users have to select the SharePoint or Office Live Lists option in the configuration dialog and log in.

However, only the first user has to make the rest of the configuration, since it is loaded from the SharePoint/Office live list to the subsequent users.

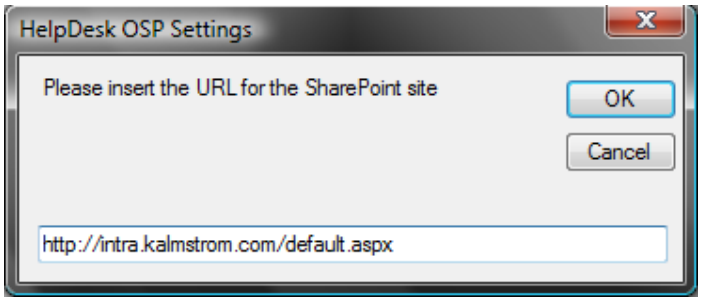


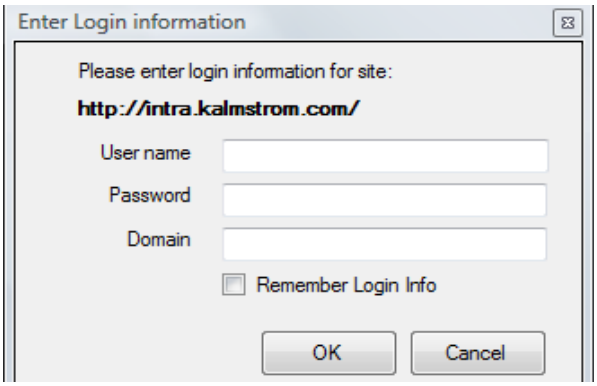
Below we show the alternative with SharePoint Lists. If nothing else is mentioned, the Office Live works exactly the same and the screen looks the same also – except that "SharePoint" is replaced with "Office Live".

To select a SharePoint list, or several lists, click on the button "Add a new SharePoint list".



Write or copy the path to the Share Point site. NOTE that you should write the path to the ***site***, not to the list.



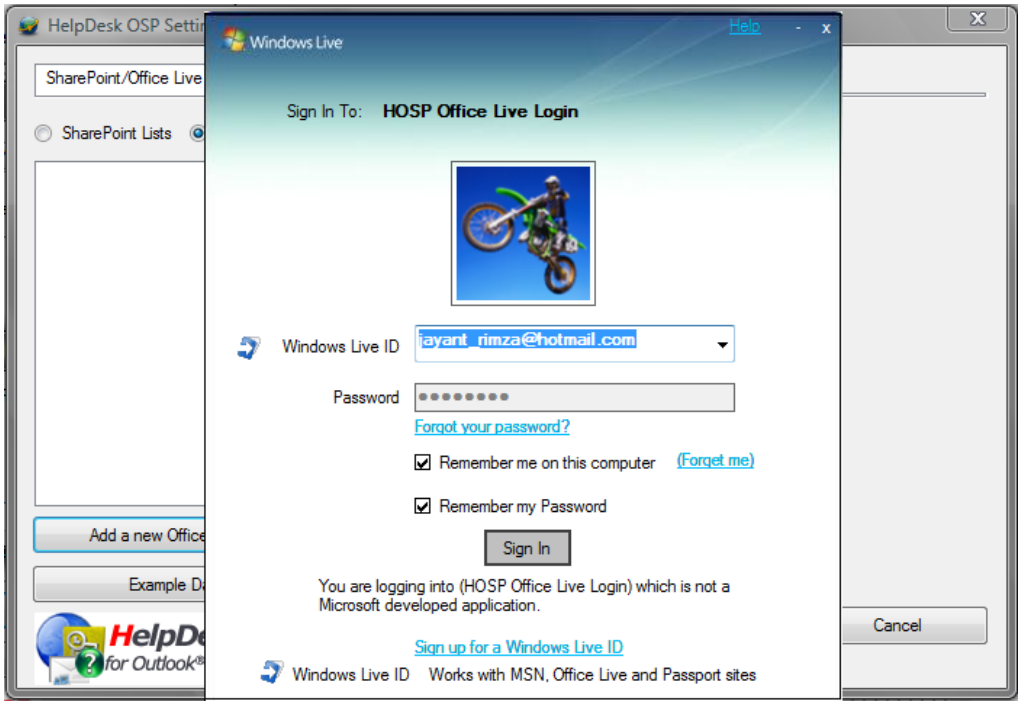


When you have entered the path to the SharePoint site you will be prompted to enter your log in details. If you check the "Remember Login Info" checkbox, you will not have to enter your credentials every time you log in to the SharePoint site. If it is not checked, *HelpDesk OSP* will ask for them every time.

If you select to remember login info, these details can be seen, tested and changed under the third tab in the *HelpDesk OSP* Settings, refer to Configuration of HelpDesk OSP – third tab, SharePoint site login information.

For better security the password is **encrypted** when saved to the file **HOSPSettings.xml**.

To connect to the Office Live site you must enter your **Office Live ID** and Password.

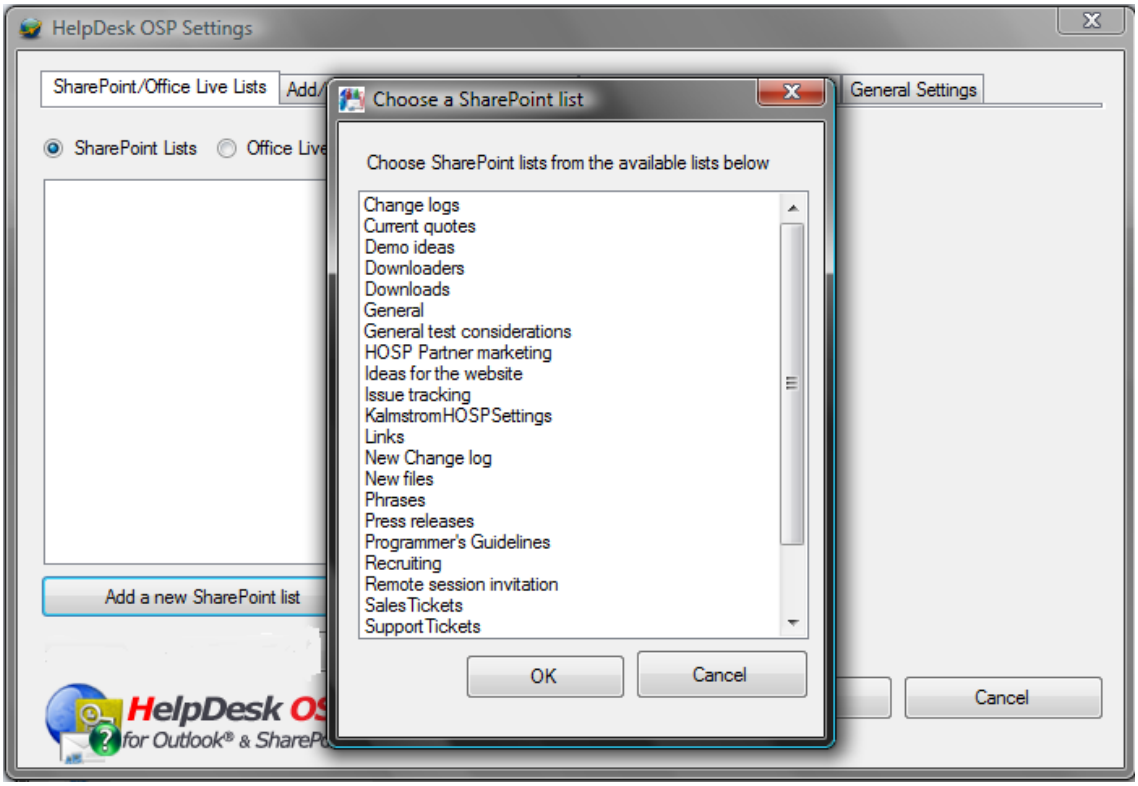


8.2 Administrator/First user

The first time a user configures the connection between Outlook and SharePoint/Office Live a hidden list is added to the site. The list settings defined by this user are saved into an item in the hidden list. This way the first user of *HelpDesk OSP* in the organization defines the list settings for all users. Since the first user creates this hidden list he needs to have **Design** or **Full control** permission over the SharePoint site.

8.2.1 Select SharePoint list(s)

Once you are connected to the SharePoint site you can select the list(s) you want to work with.

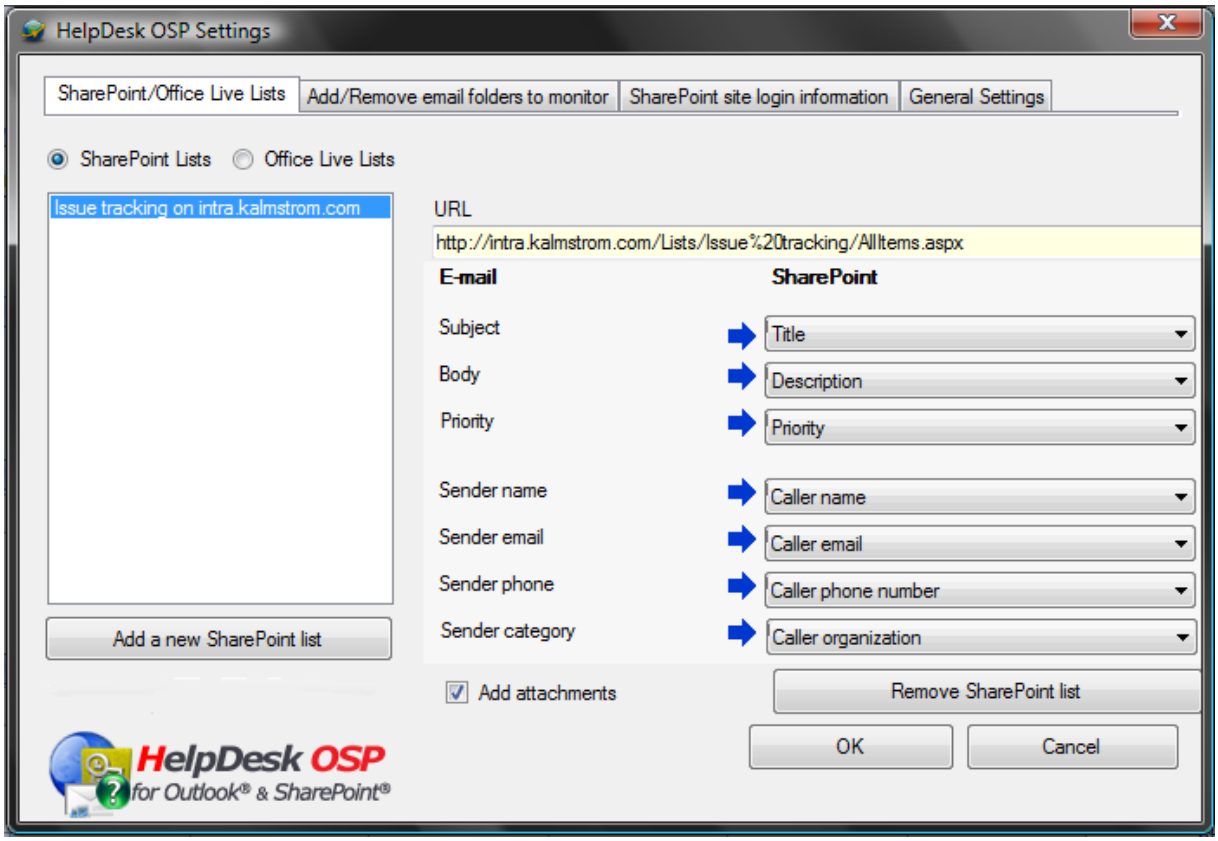


8.2.2 Conversion information

When an e-mail is converted to a ticket, information from the e-mail is automatically filled out in the ticket. In the Settings you select how the different parts of the e-mail should be filled out in the fields of the SharePoint list item.

If you for example want the Subject of the e-mail to be filled out in the Title field of the list item, you select Title from the drop down. The drop down is populated with the fields of the list you have chosen.

You can map multiple e-mail fields to the same SharePoint list column if you so wish.



These SharePoint field types are available for each Outlook field:

- Subject: Single line text
- Body: Multiple lines
- Importance: Three choices
- Sender name: Single line or multiple lines of text - not person/group yet
- Sender email: Single line or multiple lines of text
- Sender phone: Single line or multiple lines of text
- Sender category: Single line or multiple lines of text

Note: *OLAP Reporting Tool*, the statistics application integrated in *HelpDesk OSP*, does not support these characters in column names: ^ \ ; : / ! and . (dot) in the end. They will not cause any issues in the ticket creation, but they can give problems when used in the statistics.

8.3 Subsequent users

The first user has selected SharePoint list(s) and defined the conversion information, and when the subsequent users connect to the same site these settings are loaded from the site.

Each time a user selects a site to connect to *HelpDesk OSP*, the application checks if there is a hidden list with list settings for *HelpDesk OSP* on that site. If there is, *HelpDesk OSP* loads the settings in the hidden list from the site. (If there is no hidden list, this user is considered to be the first user, and the application will create a hidden list with the settings that this user saves.)

8.4 Edit Settings

When a user changes and saves the list settings, the settings in the hidden list are also updated. This way all users get the updated settings next time they connect to the site.

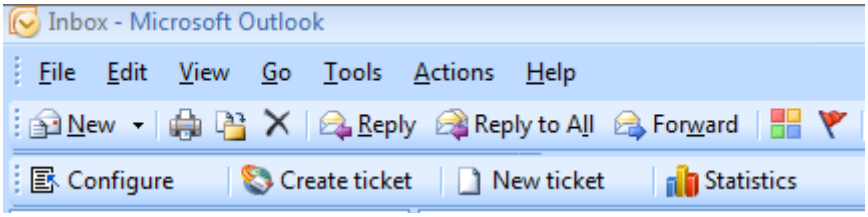
8.5 Local information

The information about site URL, password and monitored e-mail folder(s) is stored locally on each machine.

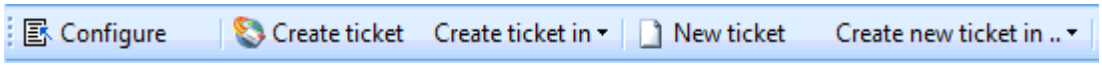
9 HelpDesk OSP buttons in Outlook

When at least one SharePoint or Office Live list has been added, three new buttons are shown in Outlook.

1. The **Create ticket** button allows you to convert an e-mail to a ticket.
2. The **New ticket** button allows you to fill out a new ticket when the support question comes in another way. The New ticket takes info from your Contacts or Global Address List. See also section 6 about Usage below.
3. With the **Statistics button** you reach the integrated Statistics Tool*, OLAP Reporting Tool; refer to* Statistics Tool.



If you have selected several SharePoint/Office Live lists to work with, you will have more buttons:



If you chose Create ticket/New ticket, the ticket will be created in the first list.

If you press the buttons with the text "Create ticket in" or "Create new ticket in", you will have a choice of the lists you have selected.

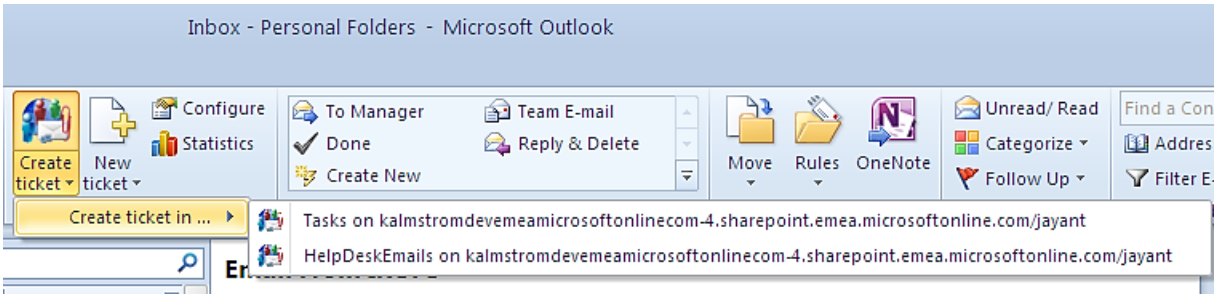
The captions Configure and Statistics can be hidden to give you a smaller toolbar, refer to Configuration of *HelpDesk OSP* – fourth tab, General Settings and Registration.

In **Outlook 2010** the *HelpDesk OSP* buttons are placed under the ribbon Home tab.

If you wish the ticket to be placed in the default list, just click on the Create ticket button or the New ticket button.

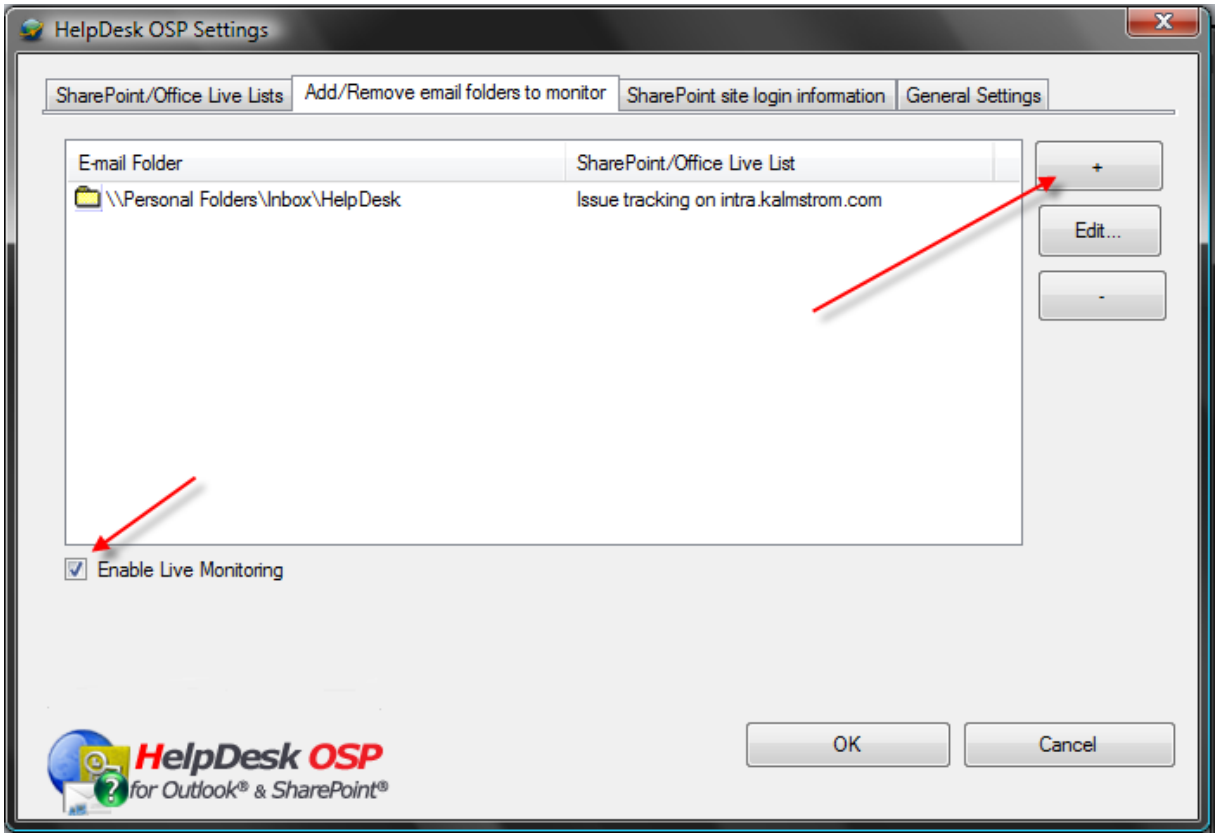
If you open an e- mail in a new window in Outlook 2010 you will also find a conversion button there.

If you want to have a selection of several lists, click the dropdown arrow to the right bottom of the button.



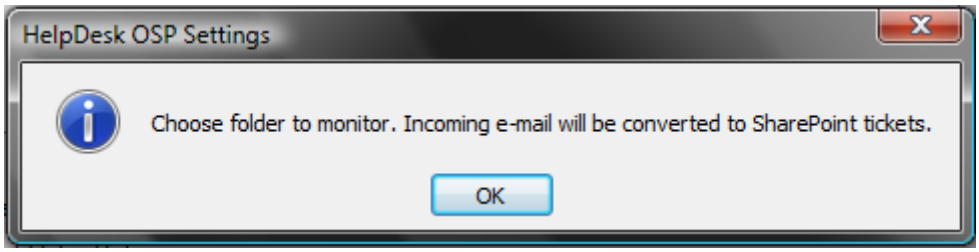
10 Configuration of HelpDesk OSP – second tab, automatic e-mail conversion

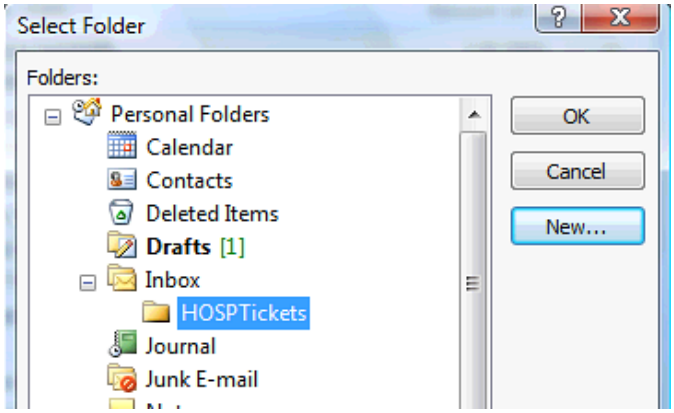
All users who want to convert e-mails to tickets **automatically** must configure the second tab. The checkbox for Live Monitoring must be checked.



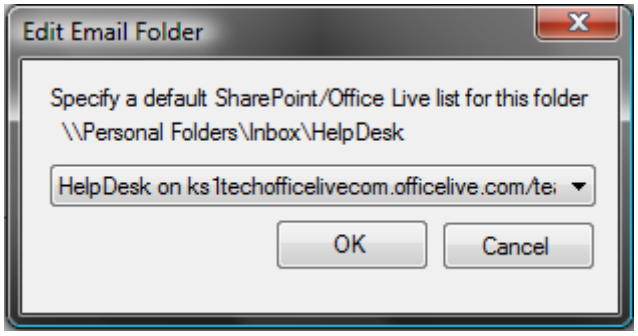
On the right side of the dialog you can Add, Edit and Remove lists to monitor automatically.

If you click the plus sign you will be asked to select an Outlook folder to monitor. The e-mails from that folder will be placed in a subfolder named Converted, once they are converted.





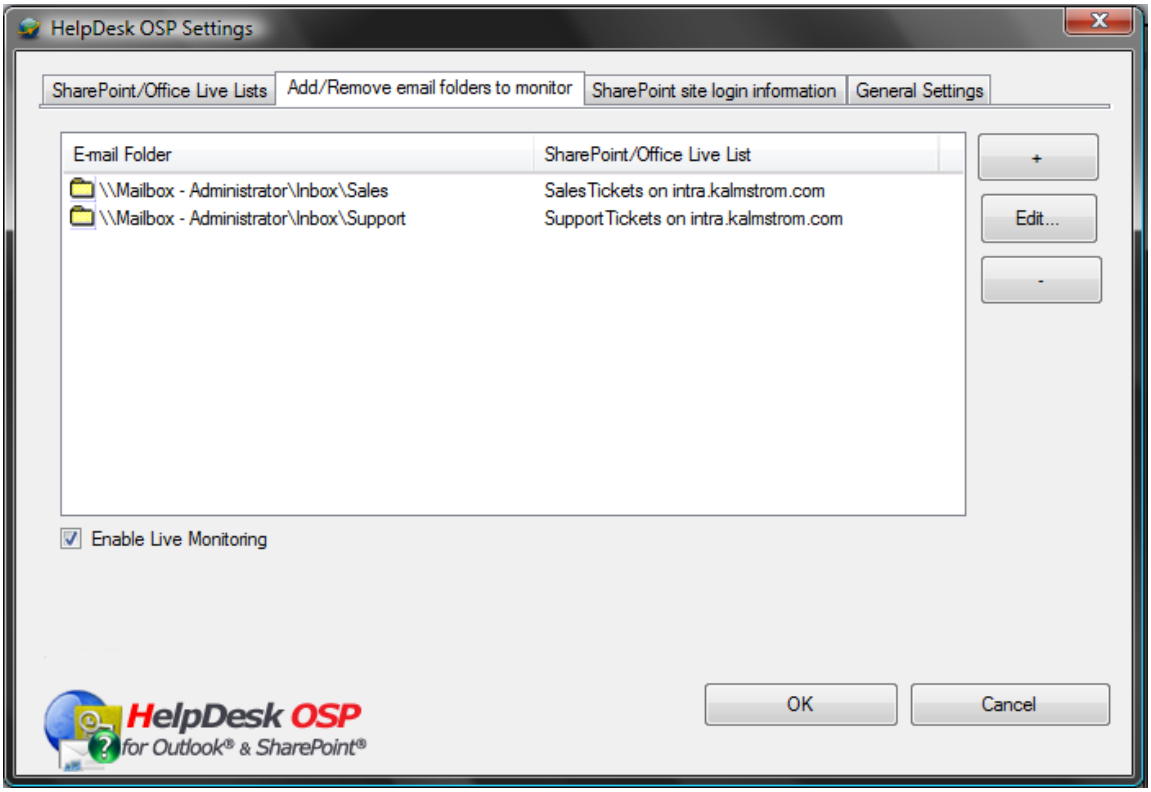
When you have selected an Outlook folder to monitor, a small dialog window is launched. It allows you to select a default SharePoint/Office Live list for that particular folder.



10.1 Default lists for different Outlook folders

If you have enabled the automatic conversion and several Outlook folders are monitored, you can select different SharePoint or Office Live lists for different e-mail folders. This is a simple way to distribute the incoming e-mail to different lists.

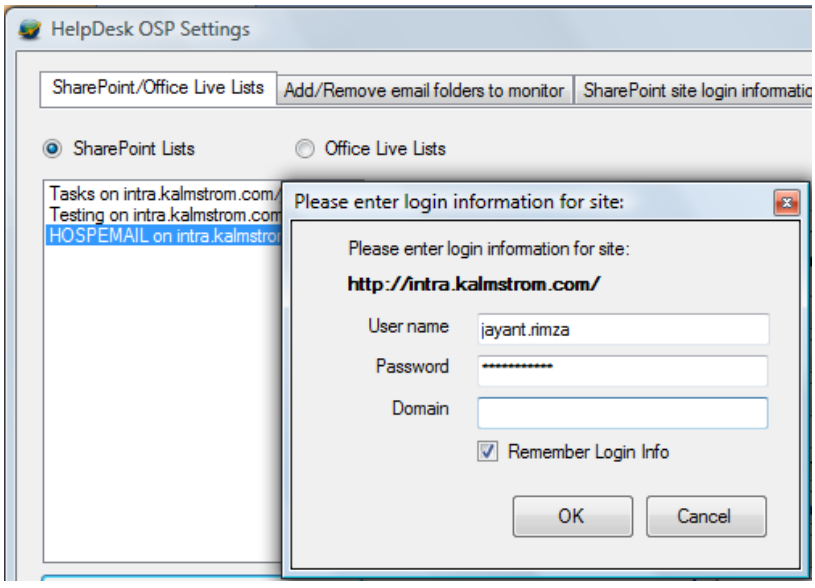
For example, e-mails to sales@company.com can be converted to list items in the SharePoint-list "Sales tickets", while e-mails to support@company.com are converted into list items in the SharePoint-list "Support tickets", like in the screenshot below.



You can even let e-mails from one folder be converted to a SharePoint-list and e-mail from another folder to an Office Live list.

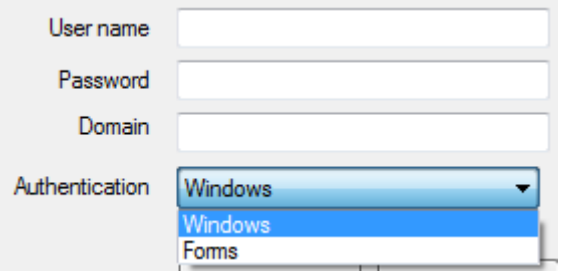
11 Configuration of HelpDesk OSP – third tab, SharePoint site login information

(This tab is not used if you use *HelpDesk OSP* with Office Live.) When you configure *HelpDesk OSP* and have entered the path to the SharePoint site you wish to use, you are prompted to enter your log in details. If you have selected to remember the login info, these details can be seen, tested and changed under the third tab in the *HelpDesk OSP* Settings.



In the list field of the third tab those SharePoint lists are shown whose "Remember Login Info" were checked at the time of List adding. Select a list and test or change your login details as needed.

By default Windows Authentication is selected, but choose Forms if your SharePoint site has Forms Authentication.

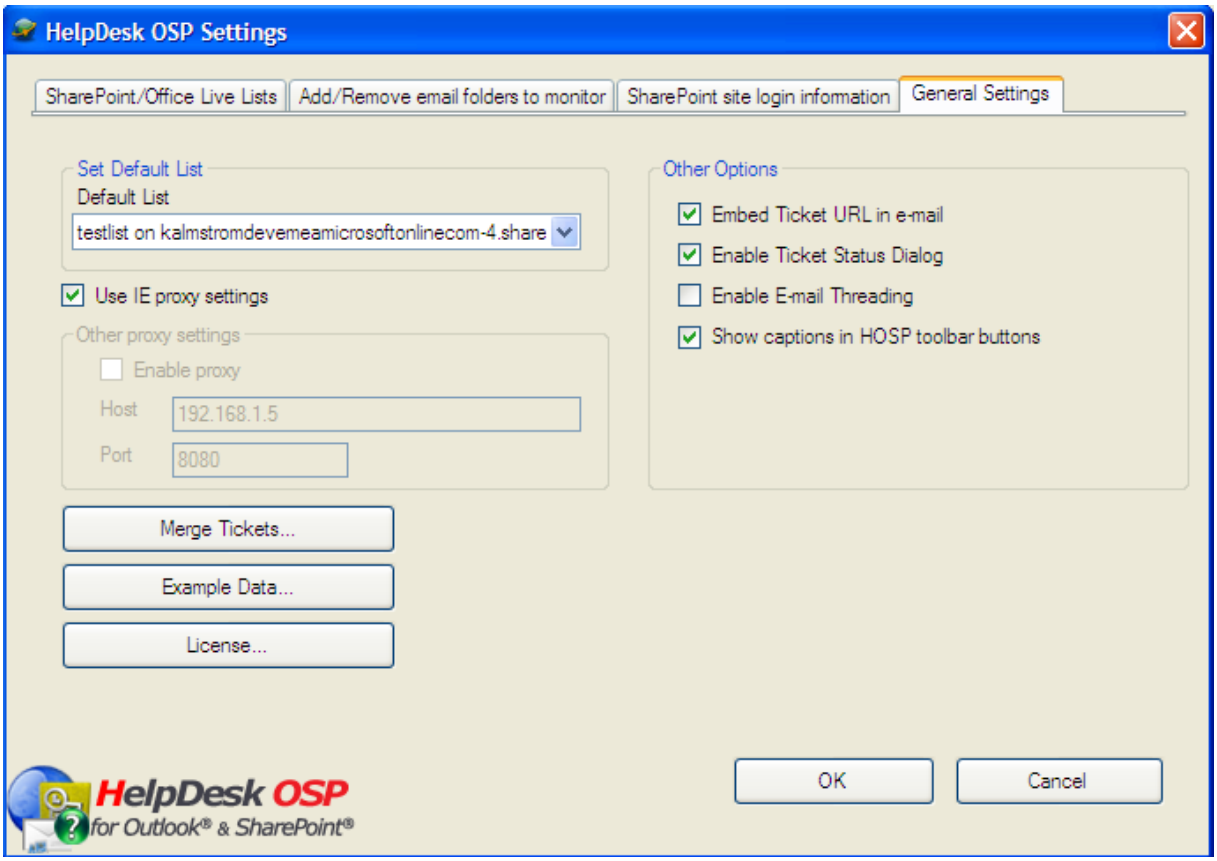


12 Configuration of HelpDesk OSP – fourth tab, General Settings and Registration

Under the forth tab some general settings are gathered. The **Merge ticket** button takes you to a dialog where you can merge tickets into one, *refer to* Merge tickets. Under this tab you can also create **Example data**, *refer to* Example Data. A click on the **License button** gives you the Register dialog, *refer to* Registration.

The **default list** under this tab is only for **manual conversion** of e-mails to tickets.

The **proxy settings** are helpful for organizations that use a proxy server for their internet connection. By default *HelpDesk OSP* reads the proxy host name and port from Internet Explorer, if proxy is enabled there of course, and makes the connection via the proxy server. Another proxy server address and port may also be used.



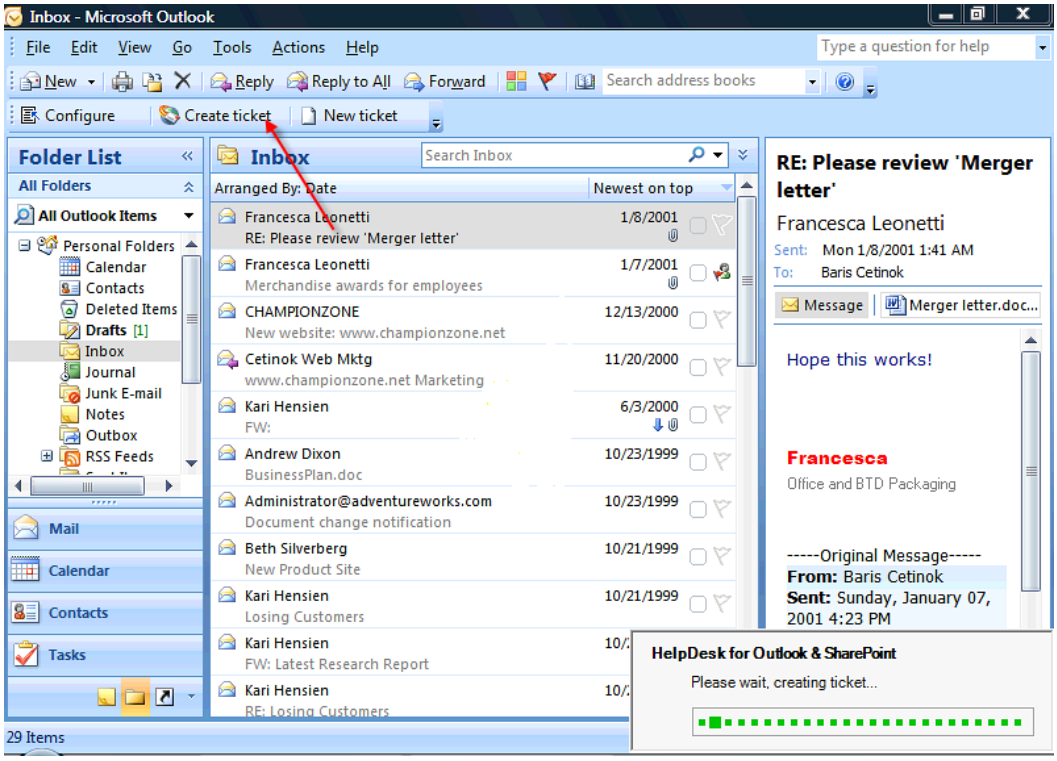
Under the fourth tab there are also four checkboxes:

1. If you don't want an **URL** to the ticket to be shown in the converted e-mail, uncheck the first box.
2. If you use **Live Monitoring** and don't want to be disturbed by the **status dialog** showing that a ticket is created from an e-mail, uncheck the second box.
3. The checkbox for **E-mail threading** is *not* checked by default. For info about how to use this feature, refer to E-mail threading.
4. If you uncheck the last box, the *HelpDesk OSP* the buttons in Outlook will not have any text.

13 Usage

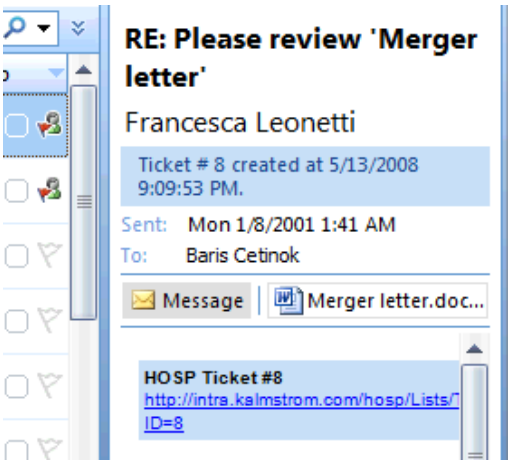
13.1 Create ticket from e-mail manually

Click the **Create ticket** button in Outlook to create a ticket from an e-mail manually. The conversion is quick, and you can work with Outlook as usual while it takes place. See also *HelpDesk OSP* buttons in Outlook.



When the e-mail is converted it gets a small icon.

The converted e-mail is marked with ticket number and date and time for conversion.

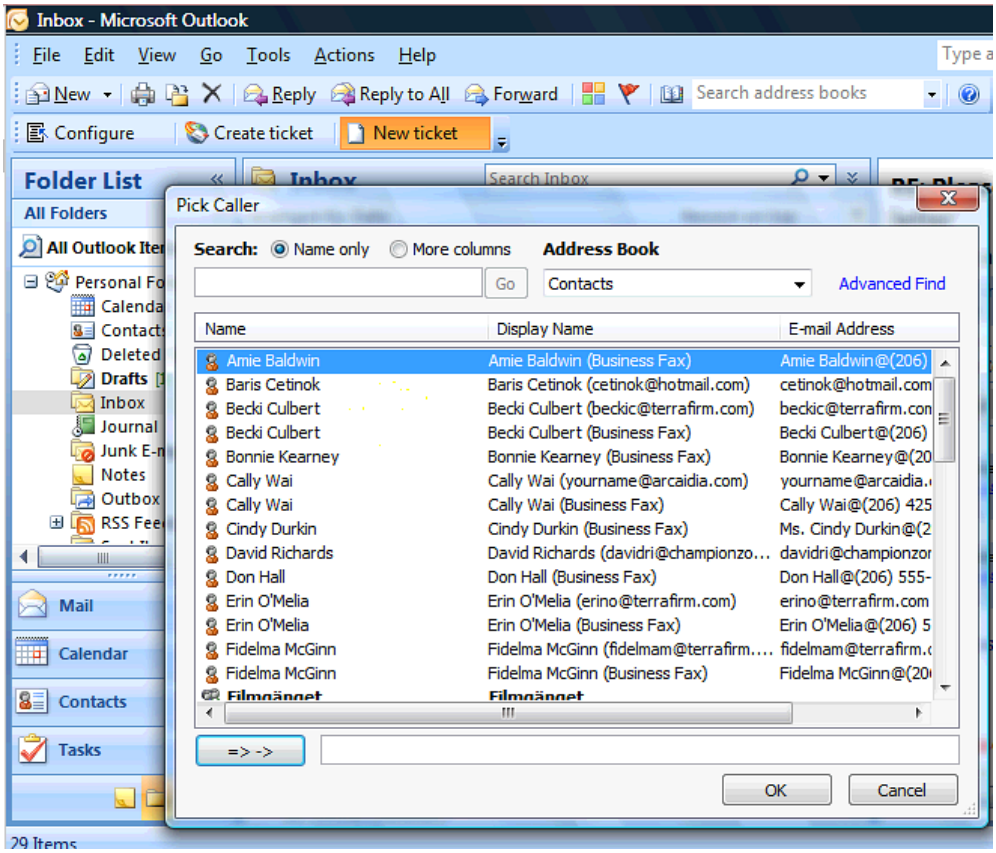


It also gets the path to the ticket itself if you have checked that box under the fourth configuration tab.

13.2 New ticket

If you get info that should be added to a ticket in another way than by e-mail, for example through a telephone call, you need to create a new ticket, by pressing the New ticket button. See also *HelpDesk OSP* buttons in Outlook.

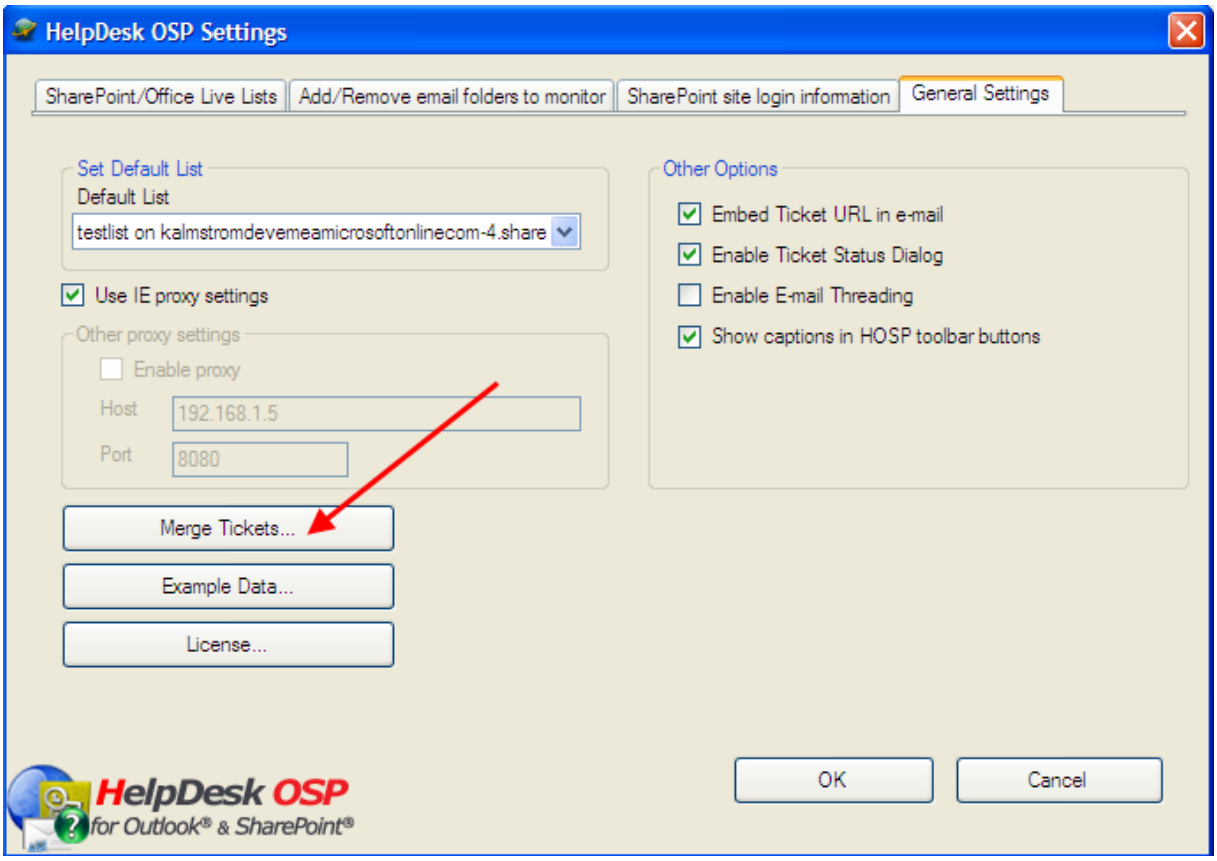
In this case you can select the caller from the Contacts or the Global address list.



When you click OK the information is entered in a new ticket, which is created at your SharePoint or Office Live site, and it is opened in your browser so that you can fill out the rest of the information, like what problem the caller has.

13.3 Merge tickets

If you wish to merge several tickets into one, press the Configure button in Outlook and then the Merge Ticket button under the fourth tab in the Configuration dialog.



A Merge Tickets dialog will open. To merge tickets, follow this procedure:

1. Select a list where tickets should be merged. If only one list is used for *HelpDesk OSP*, that one will be shown. If several lists are used, you can select the required list from the dropdown.

2. Press the Show tickets button

3. Select from the tickets in the grid which ones should be merged into another ticket, the Parent ticket.

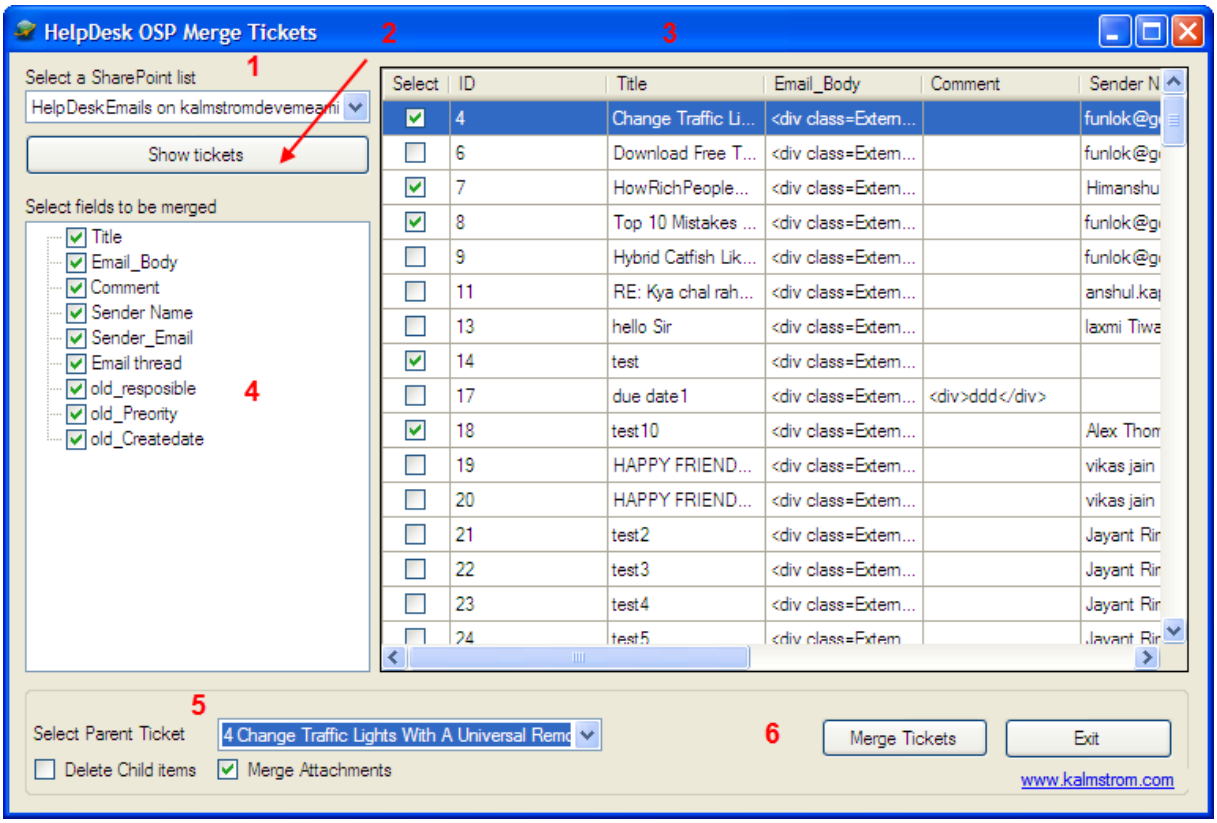
4. The Merge Tickets feature supports merging text and note type fields. For other fields merging is not possible. By default all such fields are checked for inclusion into the Parent ticket. Uncheck the fields that should not be included.

5. Select the Parent ticket. All the selected parts (4) of the selected tickets (3) will be merged into the selected Parent ticket.

   Check the delete box if the tickets that have been merged - the Child tickets - should be deleted after having been merged into the Parent ticket.

   Attachments of the Child tickets are merged to the Parent ticket by default. Uncheck the box if you don't want them to be included.

6. Click Merge to start the process.



13.4 E-mail threading

The e-mail threading feature in *HelpDesk OSP* makes it possible to add each e-mail concerning the same case to the first ticket, instead of creating one ticket for each e-mail. This process gives the responsible staff a chronological listing of all conversation related to that particular problem. The entire process is executed transparent to the user. The e-mail threading feature works for both manual and automatic conversion.

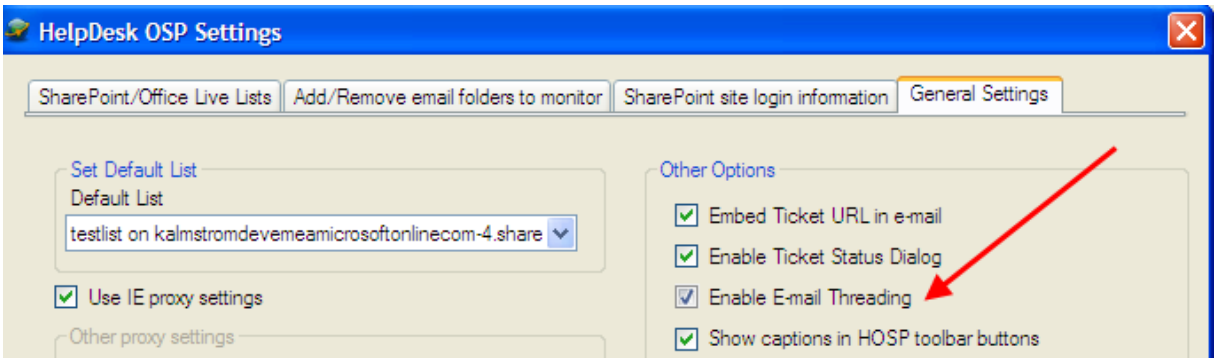
When an incoming e-mail is converted and E-mail threading is enabled, each time *HelpDesk OSP* finds a SharePoint\Office Live item with the same ticket ID as the incoming e-mail, the body of the e-mail will be added to the corresponding field of the list item with the same ID. *HelpDesk OSP* will also tag the appended content of the SharePoint ticket with the name of the sender and system time at every update.

(If an incoming e-mail is converted and *HelpDesk OSP* does *not* find a SharePoint\Office Live item with the same ticket ID, a new item will be added to the list.)

Note that for **manual conversion** you must convert also the subsequent e-mails. They will be added to the earlier ticket, but you must do the conversion step first.

When the tickets are created manually and there are multiple SharePoint lists to choose from, you have to be careful while selecting SharePoint/Office Live list from the Outlook toolbar dropdown. If you selects the wrong list when creating an e-mail thread and there is a ticket with the same ID in that list, the wrong ticket will be updated with the new information.

The 'Enable E-mail threading' option in the *HelpDesk OSP* settings under **General Settings** must be enabled for this feature to work. You must also make a setting in the SharePoint/Office Live list(s), see below.

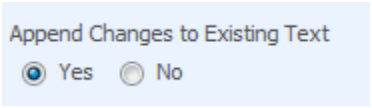


13.4.1 SharePoint and *HelpDesk OSP* settings

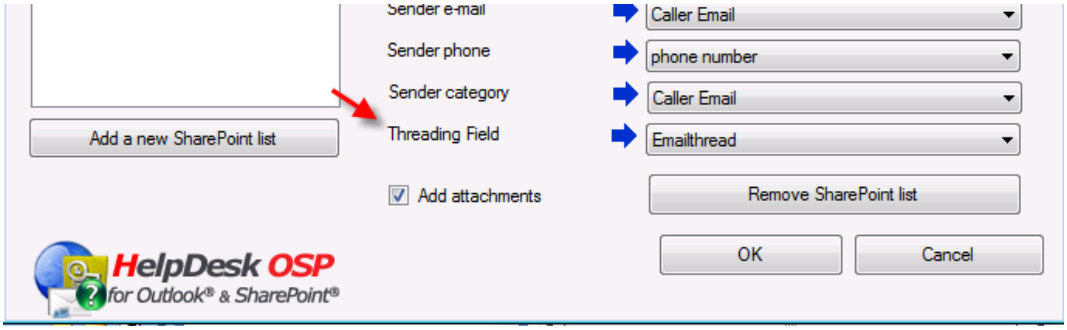
When the checkbox under General Settings is checked and the three settings below are made, every e-mail in a thread will be added to the same SharePoint\Office Live list item.

1. In SharePoint\Office Live, under List Settings >General Settings >**Versioning Settings**, activate the option **Yes** for 'Create a version each time you edit an item in this list'.

2. Use a **multiline** field with the setting "Append Changes to Existing Text" set to **Yes.**

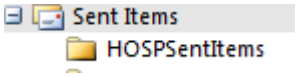


3. This multi-line field has to be mapped with the **Threading Field** in the *HelpDesk OSP* settings, first tab.



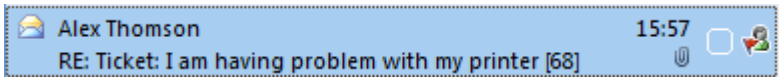
13.4.2 Sent e-mails folder

All sent e-mails of the e-mail threading will be moved to the subfolder **HOSPSentItems** under Sent Items after they have been added into the SharePoint/Office Live ticket.



13.4.3 The e-mail

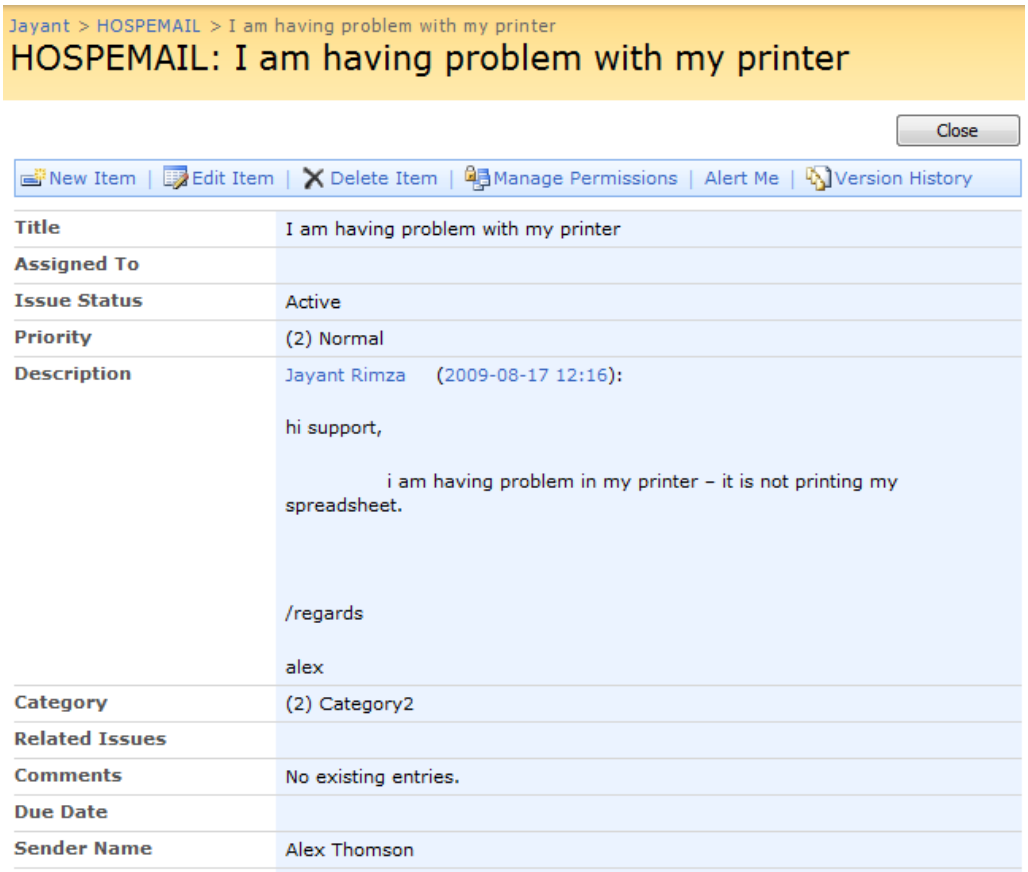
When you create a ticket from an e-mail and the option 'Enable E-mail Threading' is checked, *HelpDesk OSP* will append the ticket ID in the Subject of the processed e-mail (Ticket: + Subject + [ticket id)) to identify its SharePoint\Office Live item ID.



When you reply to an e-mail, make sure it has been converted to a ticket. Otherwise the Threading feature will not work. To check this, see if the subject line of the email has changed to "Ticket: <Subject> [ticket #] "

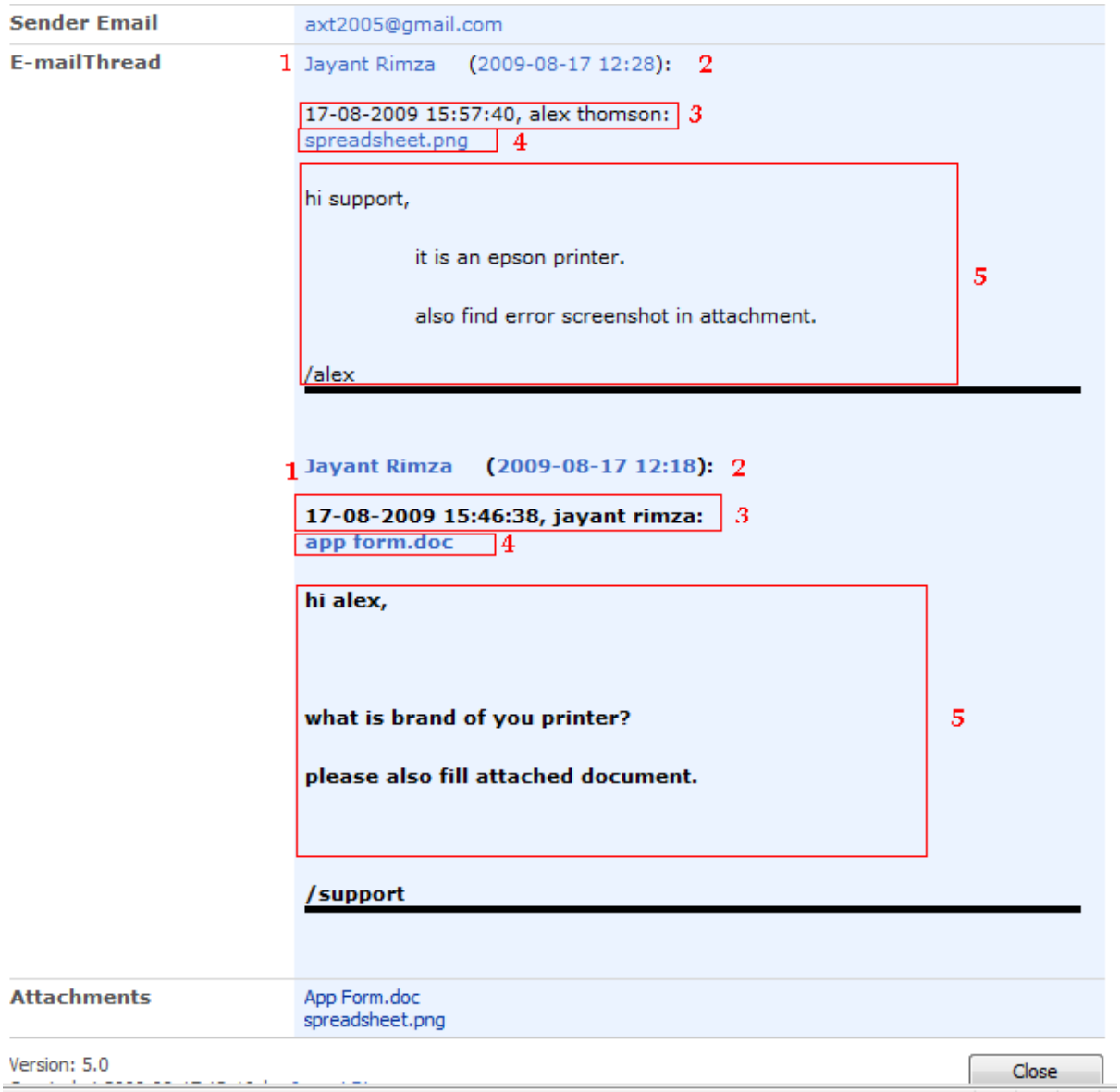
13.4.4 The e-mail thread in the ticket

This is a new ticket, created from the first e-mail of a case:



After that first e-mail more e-mails are sent back and forth. The image below shows how the e-mail thread fields will be built up above the first content:

1. The name of the person logged into SharePoint/Office Live when the update was made. Filled in automatically by SharePoint on every edit.
2. The time of the addition to the SharePoint item. Filled in automatically by SharePoint on every edit.
3. Send time of the email message followed by the name of the sender.
4. New added attachments path.
5. The new message part read from the e-mail.



13.4.5 Use of E-mail threading + multiple teams and lists

If you have a situation with several helpdesk teams, A and B, using different mailboxes to monitor incoming mails and different lists, you might want to send a case from one team to another, to ask for help. You then have the following situation:

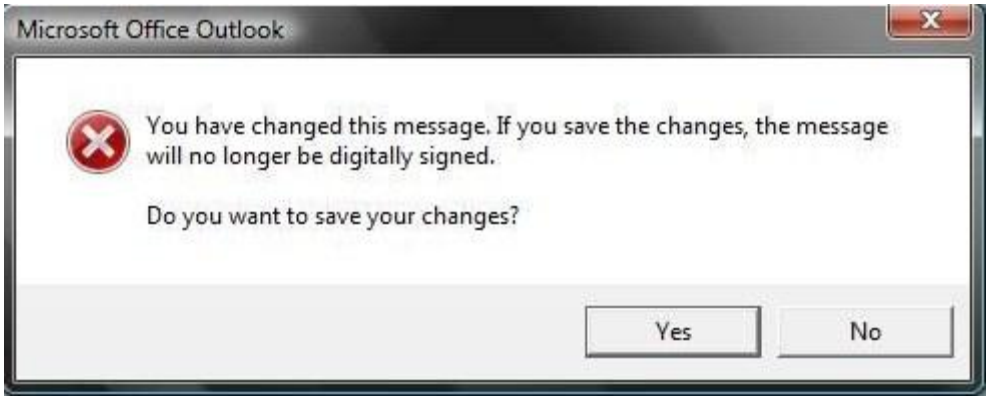
When a processed e-mail having the ticket ID in the subject field from mailbox A is forwarded to mailbox B *HelpDesk OSP* will check if there is a ticket ID tag in the subject. If it is there, *HelpDesk OSP* will try to check if that ticket exists under the SharePoint list B.

If a ticket ID does not exist, *HelpDesk OSP* will create a new ticket in list B, and this is not a problem. But if it *does* exist, *HelpDesk OSP* will add the newest portion to that ticket. Note that the problem of the ticket with that ID in list B is probably not the same as of the e-mail with that ID that originally was for list A.

To avoid this, when forwarding an e-mail from team A to team B, **remove the ticket ID under brackets** and then send the e-mail. That way *HelpDesk OSP* in team B will process that email as a new ticket in list B.

13.5 Digital signature

If the option to embed the ticket URL in the converted e-mail is selected, digital signatures cannot be kept when tickets are changed and saved. When a ticket is created from an e-mail that has a digital signature and the user has checked the option "Embed ticket URL in e-mail" under the General Settings tab, Outlook gives a security prompt. This error prompt is due to the adding of a SharePoint/Office Live URL into the mail, which will tamper with the digitally signed e-mail.


Microsoft Office Outlook
You have changed this message. If you save the changes, the message will no longer be digitally signed.
Do you want to save your changes?
Yes
No

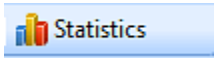
To solve this you have two options:

1. Answer yes and accept that the digital signature will be lost.
2. Uncheck the box "Embed ticket URL in e-mail". Then no URL will be added to the converted e-mails and you will not get a warning message.

14 List Customization

In the online video demonstration about List options, we show how you might like to customize the SharePoint list Issue tracking. The same principles are used when customizing an Office Live list.

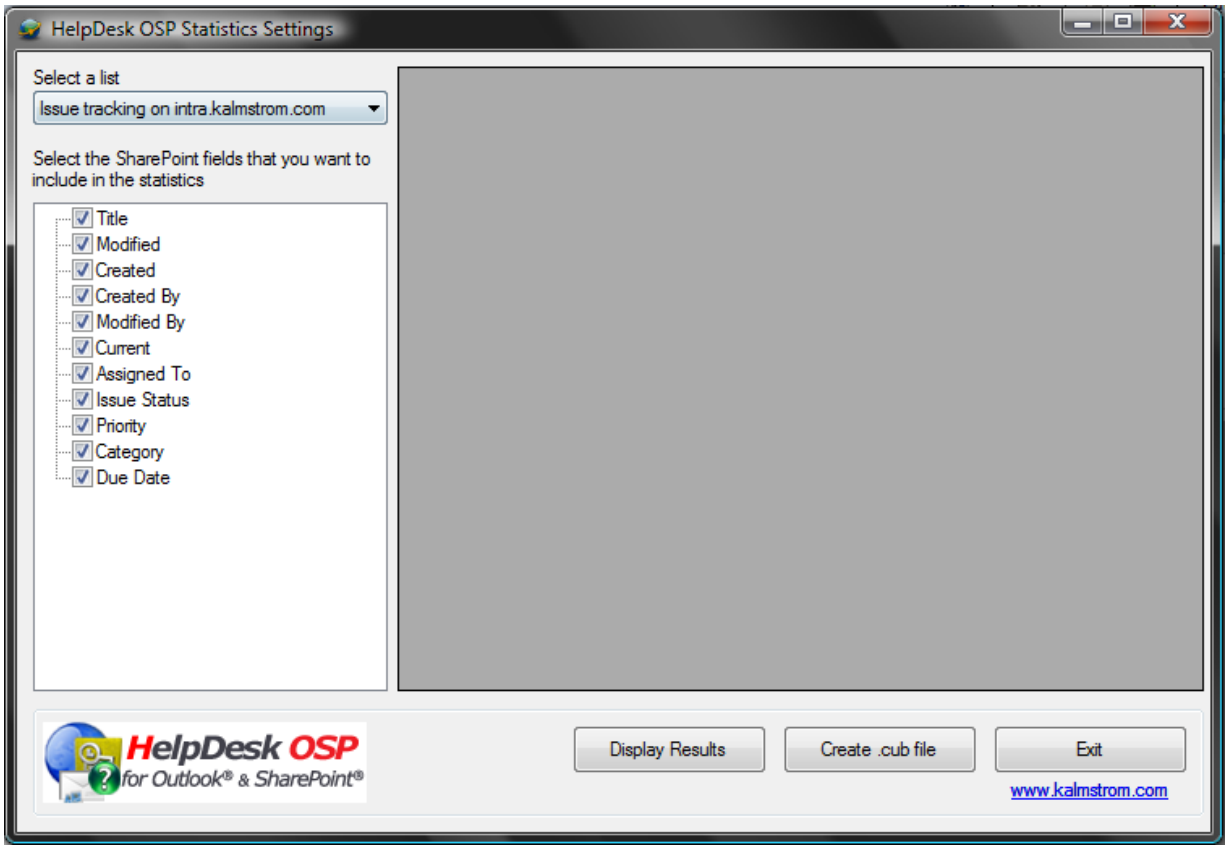
15 Statistics Tool



The statistics and reporting tool is reached via the statistics button in the *HelpDesk OSP* toolbar in Outlook. When you click it, you will get a dialog that lets you select SharePoint or Office Live list and fields. By default all the fields in your list is selected. If you want to see what you have selected, press Display results.

When you then click Create cube, a temporary Access database and a .cub file is created and you are connected to the statistics tool, *OLAP Reporting Tool*. The Access database and .cub file recreated each time you press Create cube.

For more information about *OLAP Reporting Tool*, refer to the presentation of *OLAP Reporting Tool* at the kalmstrom.com website and the manual that can be downloaded from there.

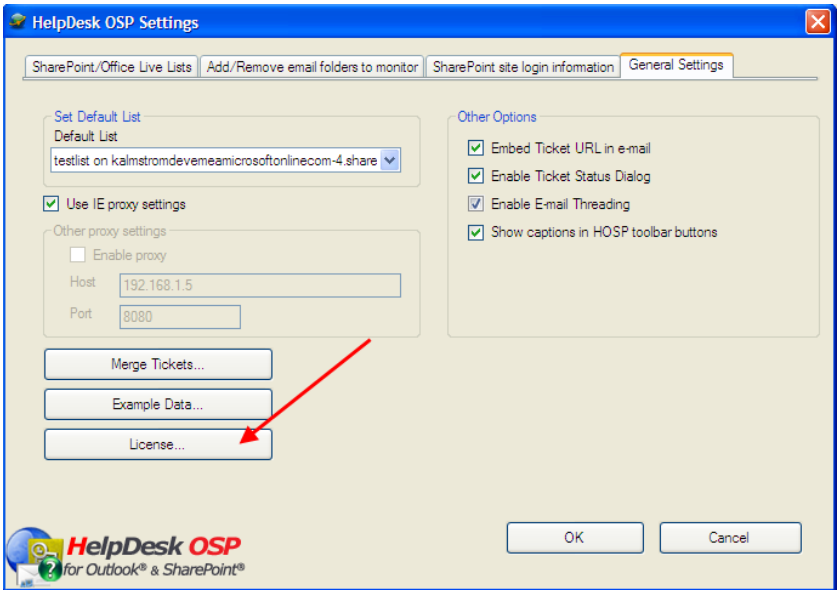


16 kalmstrom.com Community

To use *HelpDesk OSP* you must be a member of kalmstrom.com Community and pay the monthly fees. There are three different membership levels, refer to http://www.kalmstrom.com/Community/. Support, free upgrades and an unlimited number of users within the organization are included in all three levels.

17 Registration

After the 30 days evaluation period *HelpDesk OSP* stops functioning if it is not registered. To continue using *HelpDesk OSP* each user will have to insert the registration code in the License dialog under the Configuration tab **General Settings** once.



HelpDesk OSP
This is an unregistered version of HelpDesk OSP
This version will function 11 more days.
Enter the registration code below and press Registration. You must be connected to the internet for the registration to work.
Registration Key
Format: XXXX-XXXX-XXXX-XXXX-XXXX-XXXX
Registration
Exit
www.kalmstrom.com

18 Contact

The solutions of kalmstrom.com are supposed to be very easy to deploy, use and manage. However, if you have any kind of problem or questions about our software, there are several ways of contacting us:

E-mail	support@kalmstrom.com	Technical issues
	sales@kalmstrom.com	General and sales issues
Telephone	+46 739 206 106	Within USA: (800) 518-4155
Online Chat	www.kalmstrom.com	

19 Upgrade HelpDesk OSP

Follow these steps to upgrade *HelpDesk OSP*. All your settings will be kept.

1. Download the file **HelpDeskOSPSetup** in .exe or .zip format from the kalmstrom.com website. (Extract the .zip file.)

2. Close Outlook if it is open.

3. Run the downloaded file, **HelpDeskOSPSetup.exe**.

20 Remove HelpDesk OSP

Remove *HelpDesk OSP* through the Control Panel, Add or Remove Programs / Programs and Features. This will not remove the SharePoint/Office Live list(s) or the items/tickets. It will only remove the integration between Outlook and SharePoint/Office Live.

21 General Architecture

21.1 The files and their purpose

Helpdesk OSP consists of several compressed files. During installation they are automatically extracted and placed in **a HelpDesk for Outlook and SharePoint** folder under **Program Files/kalmstrom.com**, in a **My HOSP** folder under **(My) Documents** and in a **HOSP folder** under **Application Data\kalmstrom.com** or **\AppData\Roaming\kalmstrom.com** (Vista).

In the **HelpDesk for Outlook and SharePoint** folder:

HOSP.exe	The **HOSP.exe** application is run when you press the Configure button, when you create a SharePoint/Office Live ticket or manually by clicking this file. HOSP.exe posts tickets to a SharePoint/Office Live list and lets you save or change your settings, both the locally saved and the settings saved in The hidden site list.
HOSP.dll	The **HOSP.dll** file adds a toolbar to Outlook, so that you can manipulate items in your Outlook mail folders and also register *HelpDesk OSP*.
OLAPReporting.exe	The integrated statistics application *OLAP Reporting Tool* opens when you press the **Statistics** button or manually run this .exe. (*OLAP Reporting Tool* was not designed specifically for *HelpDesk OSP* but can be used for viewing any .cub-files).
HOSPCube.exe	This application is run when you click the **Statistics** button in the *HelpDesk OSP* toolbar in Outlook. It creates the **OLAP cube file** that connects to the statistics tool, *OLAP Reporting Tool*. Each time the **HOSPCube.exe** is run the old cube is removed and a new one is created. **HOSPCube** can also be run manually.
HOSPExampleData.exe	This application is run when you click the **Example Data** button in the *HelpDesk OSP* Settings. It creates demo tickets into selected SharePoint/Office Live list. You can also edit the data of these demo tickets.

This folder also contain several supporting .dll files.

In the **My HOSP** folder:

SPListItems.cub	This .cub file contains an aggregate of all tickets from a selected list. It is read and displayed by the **OLAPReporting.exe**
SPStats.mdb	This is the **Access database** where your list items are stored. The Access database is not downloaded with the rest of the files but is created automatically the first time you run the **HOSPCube.exe**.

My HOSP also contains two folders for different versions of Office Web Components. They will eventually contain your reports from *OLAP Reporting Tool*.

In the ***HOSP*** folder:

HOSPSettings.xml	This file contains the **locally stored** settings information: **site URL, password and e-mail folder(s) to monitor**. The files **HOSP.exe** and **HOSP.dll** read from and write to **HOSPSettings.xml**.

The file **OLAPlicense** is created when the statistics button is clicked the first time. It contains the registration information for *OLAP Reporting Tool* and is placed under Program files for Win XP and under Documents for Win Vista and 7.

21.2 The hidden site list

When the administrator or first user saves the configuration of a SharePoint or Office Live site in the *HelpDesk OSP* Settings, a hidden list, "HOSPSETTING" is created at the selected SharePoint or Office Live site. In that list an item is created and in the body of that list item all list info is saved. Thereby all users of the site will get these setting at a fresh installation.

Once the hidden setting list has been created it is available to all other users. When a user adds a SharePoint or Office Live list via the Outlook Configuration dialog and the application finds a "HOSPSETTING" list on that site, it loads all the configured lists to the user. This way a new user gets all list settings automatically.

If *HelpDesk OSP* finds a "HOSPSETTING" list on the site it overwrites any new settings over previous settings. All the other users get the new settings when they restart their application and connect to the site again.

21.3 Outline